DOCUMENT RESUME

ED 320 279 EA 021 943

AUTHOR	Funk, David L.
TITLE	Victory at the Polls: A Strategic Plan for Successful School Finance Elections.
INSTITUTION	Oregon School Study Council, Eugene.
PUB DATE	May 90
NOTE	65p.
AVAILABLE FROM	Publication Sales, Oregon School Study Council, University of Oregon, 1787 Agate Street, Eugene, OR 97403 ($6.00 plus $2.00 shipping and handling on billed orders).
PUB TYPE	Collected Works - Serials (022) -- Guides - Non-Classroom Use (055)
JOURNAL CIT	OSSC Bulletin; v33 n9 May 1990
EDRS PRICE	MF01/PC03 Plus Postage.
DESCRIPTORS	*Bond Issues; *Educational Finance; Elementary Secondary Education; *Public Relations; *School Support; *Tax Allocation
IDENTIFIERS	*Oregon; *Referendums

ABSTRACT

Despite the recent upheaval in public finance, the typical school district still approaches, organizes, and perceives a school finance referendum no differently than 40 years ago. Political strategy remains a rather shunned, undeveloped resource at a time when election success is most needed and when school administrators cannot take public support for granted. In Oregon, where over 50 percent of school district operating revenues come from local property taxes and tax levy support must be approved annually, successful campaigns are even more critical. The campaign strategy presented in this booklet strongly resembles the step-wise, goal-directed models used in business and political persuasion. The first chapter discusses the continuous school district efforts that lay the foundation for a successful campaign. Chapter 2 discusses the more technical aspects of scheduling and structuring a tax issue election. Chapter 3 focuses on organizing the district campaign team and includes a campaign calendar that plots the chronological events in a hypothetical school finance campaign. Chapter 4 covers the theoretical foundations underlying campaign strategy, and chapter 5 presents practical suggestions for conducting a successful campaign. This final chapter also includes numerous examples of campaign techniques used by school districts. Appendices contain a campaign planner, a generic enumeration polling script, a sample information fact sheet, a sample ballot, two case studies, sample citizen endorsements, and a precinct reporting sheet. (22 references) (MLH)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED320279

VICTORY AT THE POLLS

A Strategic Plan for Successful School Finance Elections

David L. Funk

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☑ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

P. Pirie

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Oregon School Study Council
May 1990 • Volume 33, Number 9

EA 021 943

OSSC BULLETIN

BEST COPY AVAILABLE

VICTORY AT THE POLLS

A Strategic Plan for Successful School Finance Elections

David L. Funk

Oregon School Study Council
May 1990 • Volume 33, Number 9

ISSN 0095-6694
Nonmember price: $6.00
Member price: $4.50
Quantity Discounts:
10-24 copies - 15%
25-49 copies - 20%
50+ copies - 25%

OSSC STAFF

Philip K. Piele, Executive Secretary
Stuart C. Smith, Editor
Linda Lumsden, Associate Editor and Production
David Funk, Graduate Research Assistant
Bijaya K. Shrestha, Graduate Research Assistant
Ethan Guinn, Publications Sales
Paul Thompson, Production

OSSC GOVERNING BOARD

Joan Hazel, School Board Member, Oregon City SD 62
John Erickson, State Superintendent of Public Instruction
Kenneth Lindbloom, School Board Member, Medford 549C
Robert Williams, Superintendent, Greater Albany Public SD 8J
Lee Christiansen, Superintendent, Washington ESD
Philip K. Piele, Executive Secretary, Oregon School Study Council
Paul Goldman, Associate Professor, Division of Educational Policy and Management, University of Oregon
Milt Baum, Associate Superintendent of School Management Service Division, State Department of Education
Carol Turner, School Board Member, Oregon School Boards Association

OREGON SCHOOL STUDY COUNCIL

1787 Agate Street
University of Oregon
Eugene, Oregon 97403
(503) 346-5045
Fax: (503) 346-5890

The University of Oregon is an affirmative action, equal opportunity employer.

Preface

This OSSC Bulletin is the first of three issues on the theme of school-community relations. Although the three Bulletins can all be read as self-contained, separate "how to" manuals, they were developed specifically as a companion series. Each Bulletin directly relates to and is dependent on the others. Success at the polling place (the subject of May's Bulletin), as all school referenda campaign veterans know, results from year-round communication of the value of education to the local community, which is September's topic. And one proven method of strengthening community ties is partnership agreements with the private sector, including flexible and shared use of school facilities with the community, which is the focus of October's Bulletin.

To further our belief that the Bulletin is appreciated for both its scholarly insight and its practical wisdom, we encourage you to use these Bulletins as you would a reference. Use, for instance, the statistics from the discussion on the earning power of a high school diploma in September's issue when explaining the value of strong schools to the local Rotary Club, or adapt for your own bond issue the referendum campaign planning guide provided in May's Bulletin. It is hoped that the extensive graphs, tables, and sidebars in the next three issues, furthermore, will help you to locate quickly and to retrieve specific topics of interest for your own use.

School administrators today face an incredibly complex school and community environment, where legal, political, and public relations expertise are fast becoming administrators' most crucial attributes. The changing dynamics of school finance, the sudden impact of private businesses focusing on schools, and the public's new energetic role in school affairs all leave school officials frantically attempting to cope with such developments. It is hoped, therefore, that the next three OSSC Bulletins will lend time-conscious school administrators much needed perspective on—and provide an organized, systematic, and abbreviated approach to—their school's relationship to its community.

David L. Funk, a research assistant, is a student in the University of Oregon's educational administration doctoral program, where he specializes in finance and economics in higher education. After three years' teaching political science at Ohio University, Funk worked as a journalist in Venezuela before returing to academia.

Philip K. Piele
Executive Secretary

Contents

	Preface	iii
	Introduction	1
	Need for Campaign Strategy	1
	A Growing Financial Crisis	2
	Do Educators Lack Business Savvy?	3
1.	**Laying the Campaign Foundation**	5
	A Year-Round Effort	5
	Identify Your Voters	7
	Conduct Your Own Survey	7
	Voter Registration	8
2.	**Now What Do We Do? The Election Format**	10
	Have You Looked at Alternatives?	11
	What Should You Ask for?	12
	Structuring the Tax Issue	13
	The Tax Plan Team	14
3.	**The Campaign Team**	16
	The Steering Committee	16
	The Campaign Calendar	18
4.	**The Campaign**	19
	Developing Election Strategy	20
	The Message	21
	Identify and Target the YES voter	25
	Confronting the Opposition	27
5.	**Campaign Strategies**	29
	Communicating the Message	29
	Presenting the Budget	30
	The Campaign Logo and Slogan	35
	Publications	36

The Media 39
Evaluation 40

Conclusion 41

Appendices 43
Appendix A: The Nine-Month School Finance Campaign Planner 43
Appendix B: Generic Enumeration Polling Script 45
Appendix C: Sample Q and A Informative Fact Sheet 47
Appendix D: Sample Ballot 49
Appendix E: Case Study—Large School District 50
Appendix F: Case Study—Small School District 52
Appendix G: What They Are Saying 54
Appendix H: Precinct Reporting Sheet 55

Bibliography 56

Interviews 58

Introduction

"Read my lips—no more new taxes." The author of that statement needs no identification, and yet school districts are increasingly hearing the same refrain from their local taxpaying communities—"no more new school tax initiatives."

The so-called taxpayers revolt, symbolized by the passage of Proposition 13 in California, even if it hasn't entirely transformed public finance across the nation, symbolizes a profound shift in U.S. taxpayer attitudes. Scepticism toward U.S. public institutions is on the rise, and an ever-more intensive scrutiny follows the tax dollar today. Americans are simply exasperated over repeated headlines of waste, fatness, and fraud in our publically supported institutions, and have rightly demanded more control.

Proposition 13 proponents argued that taxpayer spending must be more closely linked to the direct benefits. And in California, at least, the message was clear: we want less local property tax money going to the community next door or the other forty-nine states.

Concurrent with this reticence toward higher taxes is the movement to privatize public insitutions and services. We now look toward private individuals, private companies, and private initiative to satisfy some needs previously filled through public means. Corporate America, as we will see later, is putting less faith in public education's ability to provide skilled, able employees; the increasingly popular solution is to fund their own training and/or educational programs, or to develop partnerships directly with the schools.

Need for Campaign Strategy

Despite this upheaval in public finance, the typical school district still approaches, organizes, and perceives a school finance referendum no differently than forty years ago. While successful politicians have kept pace with campaign technology and the changing attitudes of the public, those who organize most school finance referenda still consider the yard sign the beginning and end of campaign strategy. Anyone who witnessed the Bush-

Dukakis presidential race of 1988 saw two well organized, technically precise, and sophisticated strategems that elevated the art of persuasion into a cold science.

Schools, on the other hand, which must compete for the same public attention against other highly organized and politically skilled interest groups, all too often retreat from aggressively wooing the public. The fact is, political strategy remains a rather shunned, undeveloped aspect of the typical school district at a time when election success is most needed.

A Growing Financial Crisis

According to "Education Vital Signs," a supplement to *The American School Board Journal* (Oglesby and Shannon 1989), new school construction costs have risen dramatically in the 1980s as aging buildings must be replaced. In 1988 alone, school construction and renovation costs totalled $7.9 billion—a whopping 19.7 increase from the year before. Twenty percent of U.S. school buildings are over 50 years old, with roughly 1,000 schools over 90.

To compound the financial predicament caused by aging buildings, more babies were born in the U.S. in 1988 than in any other year since 1964, meaning bulging classrooms in 1993. Oglesby and Shannon cite a 1989 study by the Education Writer's Association that lists one out of every four school buildings in inadequate condition and puts the total price tag for repair and construction at $125 billion. Given such statistics, it is not surprising that the *Journal of Education Finance* identifies the financing of school construction as "the education issue of the 1990s" (Oglesby and Shannon).

Financing school construction may be the issue of the new decade, but the source of these funds—local school bonds dependent on voter approval—is the reality we inherited from the last century. Although bond approval

Table 1: Annual New School Construction Costs

New school construction (in millions of dollars)	
1983	3,650
1984	3,699
1985	4,520
1986	5,958
1987 (estimated)	6,287
1988	7,900
1989	8,200
1990	8,600
1991	9,200

Source: Oglesby and Shannon (1989)

rates improved nationwide from 76.6 in 1986 to 79.8 the next year, school administrators cannot take public support for granted. Many communities have repeatedly turned down bond referendums, spelling dire educational consequences for those districts (Oglesby and Shannon).

In Oregon—where over 50 percent of school district operating revenues come from local property taxes—the importance of voter approval is even more critical, because districts must request tax levy approval on an annual basis. The lack of successful finance campaigns in some Oregon districts has resulted in temporary school closures. The tragedy is that some of those referendum defeats may have been avoidable if only schools had not neglected year-round public relations work and not downplayed the importance of campaign strategy in election success.

The purpose of this Bulletin is not so much to answer why the importance of school referendum strategy has often been underemphasized, but rather to present, in a straightforward and step-by-step manner, how to develop, organize, and ultimately implement an effective school finance election strategy.

Do Educators Lack Business Savvy?

National news magazines, including *Newsweek* ("Education in America: A New Look" March 12, 1990) and *Business Week* (Doyle October 1988), have devoted extensive supplements to the perceived national crisis in education. Bearing such titles as "Is American Education on a Collision Course with the Future?" and "Education in America: A New Look," the media attention given to this topic reflects the perception that educators lack the necessary business and productivity-minded savvy of the private sector. The supplements signal an indictment that school officials lack the resources and the business sense to ensure strong public education in the 1990s, and that business initiative must pick up the slack.

Indeed, the private sector/public school partnerships springing up across the country attest to business's serious intent to help education steer its future course. Once the business community transforms education, it is implied, public schools will become competitive and productive again. And they are right—schools must become more business-aware, politically savvy, and publically responsive. But schools must accomplish this on their own!

The following strategy, which outlines how school districts can get what they want at the polls, bears a strong resemblance to the step-wise and goal-directed models used in business and political persuasion. At the same time, however, schools are not based on a bottom-line productivity—and campaigns accordingly cannot tolerate a win-at-all-costs attitude. School finance campaigns, instead, require an honest presentation of the financial situation and a genuine message of educational mission balanced by enough campaign savvy to achieve the objective—to win!

Successful school finance elections depend as much on what a district

does months prior to a campaign as on the actual campaign strategies that are used in the weeks before the vote. For this reason, chapter 1 discusses the continuous prereferenda school district efforts that lay the foundation for a successful campaign. Chapter 2 discusses the more technical aspects of how to schedule and structure a tax issue election. Chapter 3 focuses on how to organize the district campaign team and includes a handy campaign calendar plotting the chronological events in a hypothetical school finance campaign. Chapter 4 covers the theoretical foundations behind campaign strategy and sets the stage for chapter 5, which presents practical suggestions on how to conduct a successful campaign. This final chapter also includes numerous examples of campaign techniques school districts have used in the past.

Chapter 1

Laying the Campaign Foundation

Ever wonder why school districts that are repeatedly successful in finance campaigns have difficulty explaining how they created their winning strategy? It is the same reason that winning politicians never truly start re-election campaigns—they never stopped stumping from the previous campaign. Successful school districts have discovered that cultivating a supportive voting public is a year-round activity, not a technique to be shelved until the next election.

There simply is no substitute for implementing a continuing community relations plan in garnering public support for one's schools. Although the creation and organization of a community relations program is the topic of the September 1990 Bulletin, the need to root a finance campaign in the fertile soil of an ongoing public relations program warrants a brief discussion here.

A Year-Round Effort

All successful finance elections are built on the foundation of ongoing public relations programs. But the magnitude of a public relations department can range from one office file cabinet to a staff of skilled public relations specialists employing the latest computer technologies.

Recently Oregon's Hood River County School District instituted a continuous public relations campaign. District officials credit that effort for the passage of two recent tax levies with approval rates of 65 to 70 percent. "We do a public relations campaign consciously in order to keep the school before the public and be presented in a positive light," said Norman Hand, business manager of the Hood River district. "We don't want it to happen that the first time voters hear from us is at election time." Hand unequivocally says continuing community relations is the key to garnering supportive

voters. "Voters are either with you or against you—very few change their minds—and their opinions are not made abruptly, but are cultivated over time through our local newspaper, school bulletins, and P.R. brochures," he said.

Although the style and scale of school public relations programs vary greatly, there is no question that some form of continuing community relations work is necessary. At the minimum, a school district should strive to:

- Identify and store in a computer the names and addresses of eligible voters in the district, including their past voting positions based on enumeration polling, if possible. (See chapter 4 for information about enumeration polling.)
- Monitor public attitudes that might affect voting behavior.
- Track demographic, economic, and political trends in the district.
- Keep the schools before the public eye, so that the voters do not hear about the schools only at election time.
- Identify existing sources of support within the community.
- Understand the voting trends on school issues over the last ten years.

Even districts with smaller enrollments are realizing the importance of a continuing public relations campaign. Consider Jefferson County School District in Madras, Oregon, where Superintendent Darrell Wright and Business Manager Phillip Riley help publish a monthly newsletter and personally write a quarterly report on the schools. "We're small, but we still conduct a year-round public relations campaign. By doing the little things year-round, such as our weekly radio show, we build the foundation for everything that happens in our campaign," said Riley.

The Douglas County School District ironically lost its community relations position when a tax levy failed and, not coincidentally, has experi-

Who Are the New Neighbors?

Josephine County School District in southern Oregon, home of Grants Pass, has suffered failed school levies since 1986-87 due in large part to changing demographics. Grants Pass, like many cities in southern Oregon, experienced a tremendous influx of California retirees during the 1980s, which transformed some locales into virtual retirement communities.

With little understanding of the Oregon tax system and no connection to the schools, these new arrivals tend to be NO voters on school finance issues.

Evidence indicates, though, that retired voters are not automatic NO voters, but do require a targeted appeal to vote YES.

Josephine County School District's challenge is to identify its newly arrived voting public and then directly address the issues that are most important to that largely retired constituency. Next time, with a campaign aimed at building connections between the schools and the retired community and greater emphasis on explaining the taxation impact, the result might be different.

Adapted from *The Register-Guard*
(Wright, January 14, 1990)

enced difficulty at the polls since, according to Richard Eisenhauer, superintendent of the Roseburg (Oregon) school district. "For us, it's always election time, and out of a sense of frustration we finally created a community relations advisory committee, made up entirely of parents and involved community members," said Eisenhauer.

Identify Your Voters

Regardless of a school's level of public relations sophistication, the first step toward ultimate election success is the same: A school must know its community, who votes in that community, how they vote, and why. Extensive research has been done on which campaign strategies work best with what types of voters. But if a district does not know its public and how it votes, then the election strategy is limited from the beginning.

Getting information about voters' preferences is relatively easy; all it requires is organization. The obvious place to start is with the school district's election history data. Detailed recording of voter responses taken from house-to-house canvassing, phone surveys, and exit polls collected over successive elections will permit analysis of typically YES, NO, and swing voters. Election poll books are open to the public and provide a useful profile of individual precinct voting behavior as well.

In addition, abstracts of past elections are available from local county election boards for review (see story, this page). In the seminal work on voting behavior in school finance elections, *Budgets, Bonds, and Ballots,* Philip K. Piele and John S. Hall (1973) found overwhelming evidence indicating that past voting behavior in school finance elections is a significant indicator of likely future voting behavior. Piele and Hall conclude that voters tend to represent a "standing decision," making it important for a school district to know who the "standing" YES voters are and to target them.

How the County Division of Elections Works for Your District

We exist to serve the public and one of the ways we do that is by providing voting lists, according to Judy Collett of the Lane County (Oregon) Elections Division. "We have available lists of registered voters organized as walking lists, by precinct, or alphabetically, and provide their voting history back two years," said Collett. A two-year voting history in Lane County will generally include six to seven elections.

According to the Lane Elections Division, a complete list of every voter in a district costs anywhere from $50 to $70, and one can even request the list be printed on mailing labels, at a cost of one-quarter a cent per label.

"We also have computer printouts of election results going back to 1974, which the districts also make use of," said Collett.

Conduct Your Own Survey

Even if your district has extensive information on its voters, however, conducting your own survey of voter attitudes still makes sense. In one evening, ten volunteers could conduct an effective survey by calling eighty

traditionally undecided voters each and asking the following questions:

1. What issues in the schools are most important to you?
2. What level of school improvement (in dollars per year) are you willing to support?
3. Would you be willing to volunteer your time to the upcoming referendum issue?

By conducting such a survey, you are already laying a successful campaign foundation by asking for people's input and, in turn, committing them to an informal pledge of support. The request for volunteered time, furthermore, may not actually result in large numbers of new volunteers, but just making the request often curiously causes people to feel connected to the issue, to consider themselves a peripheral part of the team. Finally, you will uncover the issues most important to a critical segment of the voting population, and you can target campaign appeals accordingly.

To begin planning an election strategy, you will need to analyze not only past voting behaviors, but also other election variables that may have affected the outcome. Have school referenda, for instance, fared best in a limited election held in the fall or in the spring as part of the general primary election? Have you been successful in changing traditionally NO voters into school supporters? Did targeted absentee voters support school finance issues? This Bulletin explains voter behaviors and tells how to best take advantage of the variables in an election, but such strategies are only effective if the voting community is known.

Your school district might use the following checklist as a pre-election planner. What effect did the following factors have on past school financial election outcomes?

- ☐ Type of election
- ☐ Timing of the election
- ☐ Competing tax referendum requests
- ☐ Economic conditions in the community
- ☐ Size of the voter turnout
- ☐ Percentage of identified YES voters turning out
- ☐ Percentage of identified NO voters turning out
- ☐ The type and wording of the referenda
- ☐ The size of the request
- ☐ Major changes in campaign strategy

And if the Time Is Ripe...

The Bethel School District in Eugene, Oregon, did not prosper at the polls in the 1980s. Seven times between 1984 and 1988 they went to the polls and received a "thumbs down" answer—by an average 3 to 2 margin.

Not coincidentally, Oregon as a whole suffered through a recession during the mid-1980s, and only began to come out of it at the end of the decade. And, surprise, in 1989 Bethel passed not one but two bond issues, both with a 10 percent winning margin, following eight consecutive defeats.

Often, of course, economic recovery can be more perception and media-created image than actual healthy bank accounts, but for whatever reason, Eugene voters were more supportive at the polling place after Oregon's economic picture brightened. And to the Bethel School District, that verdict was welcome news.

Adapted from "Bethel Did It!" (1990)

Voter Registration

Voter registration drives for school districts pose a win-win situation. You win if you simply register any voter in your district. According to Gay Campbell (1989), special assistant for community relations for the Eugene (Oregon) Public Schools, "85 to 90 percent of the people who become registered through the efforts of a campaign committee will end up supporting that committee's cause." And you win again if you register voters with typically YES voting profiles.

Nowhere is the importance of registering identifiable YES voters more obvious than in Jefferson County School District's unique case. Roughly 30 percent of the Madras, Oregon, district's students are Native Americans who live on nontaxed reservation lands. "Not only are Native Americans highly supportive of education in general, but because the federal government pays their [property tax equivalent], the reservations tend to be an 80 percent YES voting block," said Riley.

The district initiated a telephone campaign to register all parents, placed registration materials in all school employees' orientation packets, and directly targeted potential YES voters with registration materials, according to Riley. The registration efforts have given Jefferson County School District renewed confidence as it approaches an upcoming levy campaign.

School staff members, parents, civic club members, retired teachers, and high school students past their eighteenth birthday are all likely YES voters (Piele and Hall). Registered voting lists will show you not only who is registered but their precinct and party affiliation. DO NOT confront people with their unregistered status, but DO provide every opportunity for them to register. Providing voter registration information and materials during staff inservice meetings, parent teacher conferences, even at school sporting events can pay direct dividends.

Happy Eighteenth Birthday

The David Douglas (Oregon) school district believes their student's eighteenth birthday is a special one. When students turn eighteen, they get a special invitation to visit the school office and receive congratulations—plus the chance to register to vote and information on how to vote.

Chapter 2

Now What Do We Do? The Election Format

After surveying and collecting information, the question becomes, Now what do we do? The next step is to choose an election format from among the three common types for school issues, each of which will affect your campaign strategy in different ways. A school referendum on the same ballot with national elections differs greatly from an election limited to the single referendum issue. And the increasingly common vote-by-mail procedure presents an entirely different challenge.

'TIS THE SEASON

When able, school boards often choose autumn dates for a referendum vote, and not just because 'tis the political season. In the spring, voters are especially conscious of taxes because of the April 15 deadline, and summers are when teachers and supportive community residents are vacationing. And what about winter? Well, who wants to trudge through the snow....

The third option, a limited or single-issue election, permits concentrating solely on YES and UNDECIDED voters. This strategy can prove beneficial if there is a loyal, even if relatively small, base of support in the community. If your demographics show a high percentage of childless parents, then a special election is highly recommended. Also, because too many requests take a sizeable bite out of the contents of the taxpayer's purse, logic says try to avoid competing with other tax issues for taxpayer support.

Multi-issue elections, particularly those with hotly contested national candidates, generally necessitate a more broad-based campaign strategy employing more mass media exposure, such as TV, radio, and billboard spots.

Traditional opinion dictates that schools stay away from vote-by-mail at all costs, fearing that the increased ease of voting brings in the less civic-minded, tax conscious NO voters. Surprising research by Piele (July 1983), however, shows that the increased turnout from vote-by-mail does not necessarily mean an increase in NO voters and that campaign strategy still largely determines election outcome. In one vote-by-mail election in summer 1982, in fact, 92 percent of the district's registered voters mailed in their ballots, and there was no significant difference in the approval rate compared to previous referendum votes.

According to the Lane County Elections Division, the average return in Lane County (Oregon) single-issue, vote-by-mail elections is 35-40 percent, which is still 10 percentage points above the average poll turnout in the same type of elections. Piele envisions campaign strategy shifting to more of a political-party model if vote-by-mail becomes widespread, an insight with implications for other school finance elections where a large turnout is expected.

> Campaigners will no longer concentrate on a small segment of the registered voter population by direct appeal—person-to-person by telephone or by mail—to encourage support on election day. Instead, mass mailing efforts will use several different computer-prepared letters tailored to appeal to each segment of the population. The technology for customized letters is here and has been used very successfully in direct mail fund raising campaigns for the last 20 years (Piele, July 1983).

Have You Looked at Alternatives?

If taxpayers were asked what two words are most often heard in connection with public school finance, they might respond "dire straits." On the other hand, taxpayers' own favorite string of election-time words might be "throwing money at it won't solve the problem." A school district might hear that familiar refrain at election time, particularly if citizens do not perceive that the schools have pursued alternatives to increased funding.

School districts have an obligation to seek out all funding sources and investigate any alternatives to voter referenda that are available. Schools are not obliged to do so quietly, however (see story, next page). The publicity created by some nonmonetary solutions, such as instituting busing to relieve an overcrowded middle school, provides wonderful campaign fodder: "Look at what we've worked with and suffered through." Active, visible pursuit of

Strike Fast

A tornado hit the Shawnee Mission (Kansas) School District community between January and March 1986, yet it had nothing to do with high winds—and everything to do with an energetic school finance campaign.

Shawnee Mission determined it needed $13.5 million for school operational costs, but was not terribly optimistic of its chances.

School leaders believed they could win only if they struck before opposition could materialize. Quickly, a thirty-five-member Committee for Excellence made up of respected community residents (and definite YES voters) lobbied local civic groups to back an upcoming tax hike, and then immediately announced, in late January, a tax referendum for March.

With an organizational structure already in place, and a $45,000 campaign fund generated from the local business community, Shawnee Mission launched into a hard-hitting, six-week campaign, and the opposition never recovered. The tax referendum passed by a 70 percent margin.

Adapted from Raj K. Chopra (1988)

Timing Is Everything

In a mail election, when the ballot arrives the vote is cast. If your campaign flier arrives the next day, it's too late. In some states ballots are mailed twenty days or more before the results are tabulated, and it is in the district's best interest to precede that ballot by just a day, if possible. School districts "can gear their whole campaign mailing process around the exact date that we mail out the ballots," said Judy Collett of the Lane County Elections Division.

matching state funding or qualifying funding programs also promotes the image of fiscal competence and public accountability. Only after a highly visible effort to solve funding woes through nonfinancial means can a school district confidently claim that money is needed to solve the problem.

Creative Fiscal Management

Hal Brauner, director of business services for the Corvallis (Oregon) school district "made" $169,000 for his district in 1986 using a "cash flow borrowing" investment strategy and in the process reassured Corvallis voters of sound budgetary leadership in the school district.

His technique was simple: operate off the borrowed revenue from selling tax anticipation notes, which are tax free, at low interest rates; meanwhile, invest current revenues at high commercial rates. The savings were substantial.

Perhaps the greatest windfall from Brauner's action, however, was the public confidence in the district's financial management that developed, and faith that future taxpayer dollars will be used prudently.

Adapted from William J. Holly (1987)

What Should You Ask for?

"If you don't know what they'll pay for, how do you know what to ask for?" It is impossible to determine absolute taxation thresholds beyond which the public absolutely will not support a bond issue, yet a good prereferendum survey can be an excellent indicator of the degree to which taxpayers will support escalating dollar requests. Various community factors influence taxpayers' willingness to support tax issues, and a well-prepared finance campaign must be cognizant of such factors.

Obviously, the health of the local economy is extremely important to consider before determining the level of tax increase requests. Less obvious, but still important, are the number of other tax requests in recent elections, past margins of election victory or defeat, and confidence in your campaign abilities.

Elk Grove Unified School District in California learned the hard way that you have to know what you can safely ask for. According to Vern Chang and Gil Albiani (1987), the Elk Grove district was experiencing growing pains (see table 2) that often pitted land and housing developers against long-time area residents. And after voters rejected a referendum request in 1986, a school-district-initiated community survey revealed an interesting profile of voter attitudes. A necessary two-thirds of the voters would not support a tax rate exceeding $4.00 per month for existing homes. Moreover, developer support would turn to opposition if the tax rate exceeded $10.00 per month for new homes.

Armed with this voter feedback, Elk Grove went back to the voters in 1987, this time with a maximum tax rate of $3.82 per month for existing homes and $9.82 per month for new homes. The new total request was for $26 million, which, combined with state funds, was enough to overcome the district's overcrowding problems, and this time it passed with an overwhelming 74.8 percent YES vote, compared to 64.8 percent the year before! Chang and Gilbiani say that Elk Grove made other changes in its campaign strategy from 1986 to 1987, yet a tax request made within the public's supportive boundaries played a key role in the 1987 success.

Table 2: Elk Grove's Eleven-Year Population Growth

Elk Grove Unified School District population growth since 1975

Fiscal Year	*Homes*	*Students*
1975	17,384	10,780
1986	35,370	18,228

Source: Chang and Albiani (1987)

Structuring the Tax Issue

How many school campaign veterans can recite the chorus of complaints about the school finance structure and its unfair treatment of certain groups within the community? The elderly, for one, argue that they have supported the schools for thirty, forty, or fifty years, long after their children moved on, and now must weather tax increases on a fixed budget. Commenting on a national Gallup poll, Piele (Spring 1983) noted that

> a suprisingly large number of persons volunteered the comment that people with children in the schools should pay a special tax and that the elderly and those without children in the schools should not have to pay any tax to support the public schools.

Property owners, meanwhile, complain that the schools' reliance on property taxes unfairly burdens landowners and stifles local development. Many problems, indeed, are inherent in our traditionally uniform tax system for support of schools, and the public's complaints certainly are warranted. One aspect of creating a healthy school image is helping all sectors of the community to realize their responsibility for, and benefit from, excellent schools, yet the cries of "unfair taxation" should not go unaddressed. An effective solution many school districts have discovered is creative taxation.

One taxation choice available in some states is alternative financial vehicles, such as Mello-Roos versus general obligation bonds. The brief comparison in table 3 shows the flexibility of Mello-Roos for patterning a tax issue to your district's particular needs and demographic composition.

Some interesting uses of Mello-Roos are apparent. Flexible tax boundaries, for instance, more appropriately fit school districts that have various population pockets widely different from each other.

Flexible tax rates permit a tax issue to more equitably match taxpayers' abilities to pay. Elk Grove School District in California faced tremendous growth during the 1970s and 1980s and needed a massive tax increase to support school expansion. If the district had selected general obligation bonds, Chang and Gilbiani explain, a seventy-year-old native of Elk Grove

Table 3: General Obligation Bonds Versus Mello-Roos Bonds

PROVISION	*MELLO-ROOS*	*G.O. BONDS*
Tax boundaries	Flexible	Must be districtwide
Tax rates	Flexible	Assessed value
Buy vehicles	Yes	No
Buy furniture	Yes	No
Buy equipment	Yes	No
Reimbursement for past election costs	Yes	No

Source: Chang and Albiani (1987)

would incur a tax increase equal to a newly arrived family with five school-age children. Recent arrivals would get all the benefits of excellent community facilities and schools while having avoided all the past costs. The public outcry of "unfair" was predictable and reasonable, and this time a fair compromise was available—the Mello-Roos.

Elk Grove's dual-tax-rate referendum—a $3.82 per month rate on existing homes and a maximum rate of $9.82 on new homes—was acceptable to the different community groups, the authors say. New housing developers, even if not overjoyed with the higher property tax, could not argue that the tax formula was unfair. Elk Grove went an additional step in exempting lands used solely for agricultural use since such lands have no student impact on the school district, again showing a creative taxation formula that builds fairness into a finance issue.

This example shows the potential that creative tax structuring has for positively influencing school finance elections. (Oregon law, however, does not permit alternative or flexible taxation structures for school referenda.) Although each state imposes its own legal restrictions on the structure and presentation of bond issues, a district should explore any and all creative tax structures that might lead to more equitable taxation (and to passable referenda!) If the world of taxation structures and legal restrictions seems intimidating, though, don't fret—rely on your tax planning team.

The Tax Plan Team

Tax structuring and navigation of the legal guidelines surrounding bond issues are beyond the scope of the typical school board member or school administrator. For this reason, hiring a tax planning team has become virtually mandatory. Discussion of the professional tax plan team is placed last in this chapter on election format for a reason, however. Due to time constraints, intimidation in face of legalese, or whatever reason, school officials show a dangerous tendency to abdicate control and decision-making over referendum planning to the professionals rather than informing them-

selves and retaining decision-making control.

It is not necessary that school officials get a law degree before participating in school finance elections; it is merely enough to ask the right questions and prompt the thorough exploration of options. Ultimately, school administrators must be able to choose which of several legal recommendations will best further the district's educational mission and relations with the community.

The chart in figure 1 shows the different components of Elk Grove's tax plan team and their respective responsibilities.

Figure 1: The Tax Plan Team

Team Member	Responsibilities
• District Staff	• Develops Facility Master • Develops Financial Plan
• Legal Counsel	• Provides Legal Election Guidelines • Highlights Legal Deadlines • Provides Specific Opinions
• Bond Counsel	• Ensures Transaction is Legal • Meets Legal Procedures • Analyzes Tax Plan • Provides Case Law Experience • Delivers Final Legal Opinion • Delivers Closing Documents
• Assessment Engineer	• Prepares Boundary Map • Analyzes Tax Base • Develops Tax Formula • Develops Tax Report
• Bond Underwriter	• Performs Financial Analysis • Structures Financial Package • Secures Bond Rating • Sells the Bonds
• Financial Advisor	• Provides Third Party Opinion • Analyzes Financial Plan • Analyzes Transaction Structure • Assists with Public Sale
• Fair Political Practice Commission (FPPC) Consultant	• Assures FPPC Compliance

Source: Chang and Albiani (1987)

Chapter 3

The Campaign Team

School officials who have just completed a finance campaign can fill an ear describing their campaign organization and strategies. Ask them how the idea for a campaign originated, however, and the memory becomes fuzzy. "Well, I think a school board member brought up the idea after reviewing our budget projections and, well, one thing led to another." Just as a formal public relations campaign must operate year-round, a process for determining, initiating, and organizing a finance campaign needs to be formally institutionalized.

The school board or superintendent generally provides the impetus behind a referendum proposal, yet the decision is often prompted by a dire financial condition where no other viable alternative exists. Some school districts appoint an individual, often the school's business or public relations manager, to monitor budget projections, community openness to school support, and voting trends in determining optimal times for school referenda.

The Steering Committee

Regardless of where a referendum proposal originates, formation of a campaign steering committee is a necessary first step. Jeannie Henry (1987) considers the formation of the steering committee and subsequent ability to find a committed chairman the single greatest determinant of election success. Successful campaigns usually have a dynamic personality directing the campaign organization.

The most common school campaign organization model begins with a school-based steering committee. Generally comprised of school personnel experienced in campaign organization and able to mobilize quickly, steering committees traditionally include, but are not confined to, the following persons:

- superintendent
- assistant superintendent

- business manager
- public relations director
- members of the board of education
- principals of each elementary and secondary school
- selected campaign chairpersons from the community

Actual campaign responsibilities can be divided up by doing such things as appointing elementary school principals chairpersons for their areas or partitioning the district into blocks and appointing volunteer parents "blockworkers." The specific organizational process is not important as long as it results in a direct voter contact campaign. Campaign volunteers divide the target voting pool and are made personally responsible for a specific number of voters.

Ideally, quotas of identifiable and reliable YES voters might be divided among the district's elementary school principals, who then apportion these YES voters among the volunteers working in their neighborhoods. This targeting of voters and training of volunteers, which represents the all-important front-line of a personal-contact campaign, is discussed in chapter 5.

Many believe that campaign organization must always be linked to a citizens advisory group. Research, however, shows little or no correlation between formal citizen participation in campaign organization and campaign success (Piele and Hall 1973). In fact, citizen participation in campaign steering efforts appears to have no special impact (see "Concerned Citizen's Take Over" on this page for a different perspective on citizen advocacy).

That is not to say, of course, that citizen activism is not a valuable campaign tool, merely that school personnel and community patrons have an equally persuasive impact in an election. There does seem to be evidence (Sheathelm 1987), though, that early public involvement in a campaign lends it extra momentum, which is highlighted by the experience in Bethel (Oregon) School District's 1989 finance campaign (see story on next page).

Opinion is mixed on the value of hiring "outside consultants." Piele and Hall actually find professional consultation counterproductive to campaign success. One explanation is that consultants are usually brought in when a campaign is floundering, underscoring the importance of early, sound organization regardless of its origin. The Fairfax (Virginia) school board, for instance, prohibited by state law from using public funds in a referendum, centered its campaign around two committed campaign cochairpersons with somewhat unexpected backgrounds—one a former school board chairman

Concerned Citizens Take Over

The Clayton (Missouri) School Board didn't have to determine when a tax levy was needed in the early 1980s—a citizens committee told them when. Formed in 1978, the Clayton School District Citizens Committee, comprised of roughly 100 citizens, informed the school board in 1980 that rising costs and no new income necessitated a tax increase. The committee proceeded to organize a campaign steering committee made up of school administrators and community volunteers and establish a grass roots campaign program. Given such community-generated support, the referendum had little difficulty passing.

Adapted from Barbara Newmark (1983)

and the other a housewife able to coordinate the campaign during the day (Hamel 1984).

The Campaign Calendar

There is no substitute for planning and coordination in a campaign. For this reason, reserve space on an office wall for a "Campaign Planning Calender of Events." Use the campaign timetable in Appendix A as a rough guide for coordinating and timing activities, but beware that no two campaigns evolve in the same manner and that your own timetable may differ markedly from this one.

Note, particularly, that the recommended timing of events—beginning nine months prior to election day in the sample timetable—will vary greatly depending on your district's situation. If you have a strong, consistently reliable community base, the announcement date might be put off until just a couple months before the election, strategically aimed at not scaring up an opposition and relying on your supporters to spring into quick action.

Certainly the announcement dates, submission of tax proposal, collection of voting behavior data, and so forth will depend on the legal requirements in your state. Timing of the activities during the final three to four weeks prior to an election are more of the tried-and-true variety, however. Be sure to incorporate your own reliable strategies into the campaign calender as well, and build upon the sequence of events as your campaign experience grows.

Bethel's Campaign MVP? A Most Valuable Public

Bethel (Oregon) School District's greatest asset during two consecutive successful election campaigns was its community-based nonprofit political action committee, the Friends of Bethel Schools (FOBS). FOBS was initiated by concerned community members and, as a result, had an easy time attracting participation by other parents, patrons, and school employees. But FOBS was effective primarily because it received its direction from Bethel's administrators.

"Administrators told us how to organize the committee and run the campaign," said Jim Ogden, an initiator of FOBS. "Ideas and tasks for the campaign all came as directives: 'This needs to be done, and this is how we need you to do it'," he said.

Ogden's comments point to a crucial aspect of successful community volunteer efforts for schools: The community is often willing to help, but is unsure how to do so. School administrators, meanwhile, are often hesitant to direct strictly volunteer groups, but must ultimately provide stronger organization to fully utilize community volunteers.

FOBS organized itself into a five-person steering community and, as an offshoot of that, a ten-person planning committee, both of which included Superintendent Kent Hunsaker and Communications Director Craig Hawkins. These committees gradually took over much of the volunteer recruiting and early election planning responsibilities that school personnel otherwise assume.

FOBS's greatest benefit, though, was the positive impact campaigning by parents and community members—rather than by teachers and school personnel—had on the community at large.

Adapted from "Bethel Did It!"
(January 1990)

Chapter 4

The Campaign

When campaigning for the presidency, then Vice-President George Bush committed the much publicized gaffe of incorrectly identifying Pearl Harbor Day in front of a Veterans of Foreign Wars gathering. It has recently come out, however, that Roger Ailes, chief campaign consultant to the Republican cause, calculated the event in order to represent Bush's human side to the public.

How would such a shrewd Machiavellian political analyst as Ailes represent a school cause to the public? Political sharks like Ailes thankfully do not maneuver in the more placid school finance realm, yet the very word *campaign* conveys the idea of persuasion. Schools are not in the business of voter manipulation, but every school finance campaign does use various political campaign techniques in which to legitimately present its cause.

Out of Failure Comes... Commitment

When Charles Finn and Diane Ravitch's book *What Do Our 17-Year-Olds Know?*, based on a National Endowment for the Humanities-funded survey of 8,000 high school juniors, was published, most educators wished it would go away. You are familiar with the chilling observations:

- Two out of three juniors did not know in which half century the Civil War was fought or in which the Declaration of Independence was signed.
- More than a third could not guess the outcome of the *Brown v. Board of Education* Supreme Court decision or the meaning of "checks and balances."
- Nearly 30 percent failed to identify the two nations that were the principal enemies of the U.S. in World War II.

Most school administrators braced for the public outcry—"What are they teaching in those schools?"—and the expected finger-pointing. Some districts saw a silver lining in the news, though, and turned the findings to their advantage. Going on the offensive, they also expressed outrage that such a situation could exist in U.S. public education, and subtly shifted the image to one of "We're all in this together." The implied message is, thank goodness, that we have quality schools that still educate, but look at what happens if local educational support deteriorates.

Adapted from Chester E. Finn and Diane Ravitch's "Survey Results: U.S. 17-year-olds Know Shockingly Little About History and Literature," *The American School Board Journal*, October 1987

Many school administrators, such as Douglas County School District's Richard Eisenhauer, who previously shunned political-like technical campaigns are now seeing the importance of precise and professional campaigns. "Anymore it is absolutely a given that you have to be politically astute.... Politics (in school finance campaigns) is a reality," said Eisenhauer.

To garner maximum support, for example, should a school be portrayed as well-equipped and ready to move toward excellence, or beggardly poor and on the brink of pauperism? Should schools focus voter attention on the good that comes from quality education, or instead center on the social costs related to poor schools? The choices of campaign style a district faces are many; unfortunately, one option—not to campaign actively—is a luxury generally reserved for bygone days.

Because there is no one best campaign strategy applicable to all districts, the following strategy should be read as a basic campaign organizational structure that must be adapted to fit individual district needs and characteristics.

Developing Election Strategy

The answers to the above questions are "all of the above": School finance campaigns must paradoxically stand tall and proud and also hold hat in hand. The public needs to hear that their support over the years has resulted in an educational system to be proud of, that their support has paid off in a better school system. People simply like to back a winner—winning football teams generate larger booster club funds, and prestigious schools receive greater financial support.

Eisenhauer agrees, and he sees to it that Douglas County School District campaigns remain positive and appeal to what he terms the "party of YES" voters. "We build enthusiasm and motivation for our campaigns by focusing on everything that is good about our schools," he said. "No matter how strongly we accentuate the positive, our community is aware and informed enough to understand that we still run a tight ship." Douglas County's past campaign rallying messages, such as "Great Schools, Great Kids" and "Do the Right Thing," demonstrate an upbeat campaign strategy.

On the other hand, undecided voters will often use a school's perceived well-being to justify to themselves voting against further increases. This type of voter can be persuaded to cast a YES vote only if a financial crisis exists. How can a district, therefore, champion its exceptional programs and quality of education and at the same time claim financial crisis?

One solution is to present funding issues in an either/or context: Either the district gets much-needed computers for its elementary schools or they go without; either the district keeps twelve exceptional young teachers through new funds or they are laid off; and so forth. Across-the-board cuts are not a recommended campaign solution since doing so disrupts the education programs already in place.

Threatening the elimination of traditionally excellent or popular programs, meanwhile, has been discredited as a campaign ploy, because the public recognizes and resents the blackmail attempt. Additionally, such threats raise the question of whether the school district will fight to support its strong programs in the future.

The Message

School referenda can be about many different kinds of issues, but there is always one central message: We need money. Attempts to skirt, distort, or manipulate the budgetary facts prove disastrous time and again. A review of successful school campaigns finds phrases such as "straightforward approach," "honest and conservative campaign," and "direct, simple presentation of the facts" used to describe such campaigns.

William Goldstein (1984), consulting specialist on school finance campaigns, argues that abuse of the public trust by "ends justify the means" advertising and win-at-all-costs political campaigns founded on deceit galvanize voters against ambiguous pledges, grandiose promises, and calculated confusion of the issues. Today, says Goldstein, public-sector leaders must "reveal, not camouflage; clarify, not confuse." Creative communication techniques, flashy ads, and so forth all are very effective, yet the foundation of any successful finance campaign is the integrity and honesty of the message being communicated.

Not surprisingly, extensive polling of school campaign veterans found near unanimous agreement on the importance of conducting candid and open campaigns. Says Phillip Riley of the Jefferson County (Oregon) School District, "We work on being credible and accountable every year, and, frankly, all our efforts are built on this foundation of trust and openness (with the community)." Eisenhauer concurs, calling effective community support a "complete credibility question."

A new emphasis on candid campaigns seems to be a national phenomenon, and the news media are quick to provide the reason why. Kay Black, a reporter for the Eugene, Oregon, *Register-Guard*, explained why deceptive political or school finance campaigns will not work:

> School districts come off looking better when they are more accurate. School

Safety Net or White Elephant?

The days of forced school closings due to failed finance elections in Oregon are thankfully a distant nightmare due to a state-mandated safety net provision, where school funding automatically reverts back to the previously established level following a failed election. The measure, approved by voters in 1987 with a 55 percent majority, sought to erase Oregon's national image as a state that lets its schools close for lack of money.

Some Oregon administrators, however, are quietly beginning to question the long-term benefits of this state law. Although school closures created embarrassment, the threat, and occasional closing, forced communities to confront the importance of local school support—and generally led to eventual voter support.

Douglas County School District's Richard Eisenhauer, who now conducts only positive school campaigns, admits that he previously used the threat of school closings as an effective campaign ploy. "Sure, we used to use scare tactics before the safety net came in, and because the threat was legitimate, our voters responded," he said.

The ability in Oregon to increase the preceding year's tax levy by 6 percent without a vote if the district has an updated tax base further preempts certain potential campaign appeals.

> campaigns do tend to be more direct than political campaigns, and that works. Eugene school districts have been very effective in having savvy people in public relations, but they know we won't rely on their releases for our information.... It is important that school districts make information available, and they should understand that when we perceive that something is being held back, we just become more curious.

Black's caution against campaign deception and her simple request that finance people and information be made available underscores what most school campaign veterans already know—honesty pays. Successful communication of a district's needs and financial situation should take a suprisingly simple tone, says Goldstein: "Selling your budget to the taxpayers requires presenting informative materials in attractive formulas that are convincing to the taxpayer." School officials must convince the public that four things are true:

1. The local funding and programs fall in line with other schools.
2. The additional funds provide the children with exactly what they seem to lack.
3. All other sources of funding have been explored.
4. The school deserves the public's confidence in its financial and educational responsibility.

Care must be taken that the district's basic message does not stray too far from championing the basic value of education. The focus must remain on children, and the message must continually harken back to the value of their education. A child-centered focus does not mean a simple campaign, however; in fact, in the last five years there has been a perceptible movement of educational insitutions into "image making" public relations efforts.

Spurred on by interested parties from the private sector, who combined a business sense of advertising with belief in the value of strong public education, schools are reaping the benefits associated with keeping their cause before the public eye. As any corporate advertising executive knows, and educators are finding out, competition is keen in developing and holding a respected image that the public will support, and only sustained efforts sway public opinion.

The Florida Department of Education, seeking to attract talented young thinkers into the teaching field and, specifically, into the Florida system, recently aired television commercials depicting a dynamic, young teacher engaged in an exciting classroom discussion. It portrayed an image. The ad was a bold, expensive venture, and yet, not suprisingly, there has been a corresponding national trend of young professionals dropping out of their career tracks and opting to teach. A changing image? Yes. Ten years ago it would have been considered wasteful for a school district to develop its public image through an ad campaign with no referendum on the horizon, yet evidence suggests that public relations work in the present pays big divi-

dends in the future.

Community relations campaigns, both at election time and year-round, should convey the view that education is an investment rather than an expenditure. And there are various ways of demonstrating why your public should support the schools (see chapter 5), where the bottom line is convincing people their contribution to education is paying dividends.

An Honestly Communicated Budget

No matter how slick or elaborate an advertising job a school district may do, there is still no hiding poor financial management. Likewise, voters can recognize genuine financial need, which, combined with perceived fiscal responsibility, will pay dividends at the polls. It is encouraging that many school finance campaigns have adopted straightforward "honest budget" approaches and found great success.

In Bethel, school administrators felt that repeated misrepresentation of the district's financial condition had so alienated the public that only a completely frank, open presentation of the school's projected condition could bring the voters back. Bethel succeeded in securing budget committee members' commitment to a "honest, lean, conservative" budget, which those members then communicated to their publics with conviction. "Honest budget" campaigns, such as in Bethel, demonstrate that the public *is* sensitive to their school's conditions, and can vote based on the objective budget information.

A school district must communicate an image of sound financial management, regardless of the financial woes facing the district or the consequences it faces if additional funding is not found.

Perhaps because of a sense of modesty, many school districts do not publicize the financial manuevers they make that often end up saving the district thousands of dollars. Unfortunately, when this occurs, the public only hears about the financial mishaps and planning oversights. If the public sees a district managing its money wisely, even creatively, that positive image carries over to the next election. Hence, a little bragging can bring big dividends. Throughout the year, let the community know how well their tax revenues are being managed. A strategy for educating the public on your effective school financial management program might include showing how you:

Track down all available state and federal funding. Conduct your campaigns for state and federal funding in the media, turning the event into a financial drama. Whether anyone understands the political and legal jargon involved is beside the point—you are seen pursuing the best interests of the community.

Seek out private partnership and/or sponsorship. Public school finance traditionally has been viewed as a single-source proposition—tax revenue funding. The private sector's sudden entrance into educational support through creative financial arrangements, such as the public school/

private business compact in Boston or Mr. X's "adoption" of a New York City third-grade class, provides a new and exciting funding alternative for schools.

Ironically, however, schools have been extremely slow to initiate potentially rewarding private funding/donation campaigns and have lost out on a public relations bonanza in the process. Imagine, for example, the campaign possibilities if a local business collective agreed to provide matching funds for a school bond referendum. Or what if a local paving contractor agreed to pave one parking space in your school's gravel parking lot for every twenty votes cast over the required amount?

Never let money sit idle. Did the district draw interest on the payroll funds between the time paychecks were mailed and when they were finally cashed and, if so, how much was saved?

Actively campaign for a high bond rating. Even if you don't get the desired rating, you've still shown the public a school district aggressively pursuing the best financial deal available.

Make banks bid for a high bond rating. Local banks might not like the competition, but they'll eventually respect your prudence.

Keep the Campaign Child-Centered

There is one point on which all school finance campaign strategists agree: Keep the campaign child-centered. The emotional appeal to the children's future is the strongest possible; this is a universal bond the whole community shares. And for worse appeal? Try (or rather, please don't) centering a campaign around salary and compensation for school administrators and teachers.

Together in Excellence

When asked what one teaches, the appropriate answer is not mathematics, social studies, or English, but students. Likewise, a finance campaign is not about computers, or new schools, or teacher's salaries, but rather about how these issues affect the quality of the *student's* education.

Identify and Target the YES voter

In school finance elections, the rule of thumb has always been—and still largely is—identify and go after your YES voters, and don't waste your time with the NO voters. A focused campaign directed at YES voters not only can prove more cost-effective but also allows a well-organized campaign to control its own destiny, so to speak.

Voting lists available from a district's local county elections board can indicate how different precincts have voted previously. By noting precinct voting patterns, areas of support can be identified. Enumeration polling, however, remains the cornerstone of a targeted campaign.

Enumeration polling is the process of contacting voters individually, usually by telephone to determine whether they will support an upcoming school finance request. (See Appendix B for a Generic Enumeration Polling Script.) Results from each enumeration poll should be entered into a database so that, over time, the district will have a strong indication of voters who always pledge support, those that tend to fluctuate, and solid NO voters.

Beyond feedback on voter behavior from enumeration polling, there are other, though less reliable, indicators of likely YES voters. Piele (1973) identifies the following groups as more likely to support school finance issues:

- Parents with elementary age children
- More highly educated
- High "community involvement"
- Supporters of nonschool tax issues
- Younger (as opposed to middle-aged)
- Trusting (as opposed to alienated)

Although voters certainly do fluctuate in their support from school election to election, there is extensive evidence showing that voter attitudes do tend to remain entrenched if no significant side issues arise. In other words, both the solidly YES and the strident NO voters in every community generally remain predictable. Piele concludes that "an area's past voting behavior in school finance elections is a significant indicator of its present voting behavior." Such common-sense findings do not come as a surprise to campaign veterans, who know to target the YES voters and have found NO voters to be a waste of valuable campaign time and energy.

The "Fail Safe" Method

Do you wish that you could determine exactly how many YES commitments you need in order to wrap up a successful election? Want to sleep better at night confident of an election win? Try the "fail safe" method.

The "fail safe" method is based on identifying YES voters and uses a reliable voting pattern equation to establish a specific campaign objective of contacting committed voters. Apply the following two-step formula to determine your own district's target goal:

1. Average the number of yes voters necessary to carry (50.1 percent) the last three or four school elections in your district. If there is an average turnout of 19,999, for example, then 10,000 YES votes is the average number needed to win.

2. Multiply the 10,000 votes by 1.25, which in this case equals 12,500 YES votes.

Ramifications: You will squeeze out a victory if you can identify 12,500 eligible voters who say they are supportive of the issue and will actually vote.

Rationale for the formula: Research on voting behavior has repeatedly shown that roughly 25 percent of voters surveyed who pledge their support to an election issue will either actually vote against it or fail to show up on election day.

Adapted from Campbell (1989)

Oregon's Hood River School District does not even address identified NO voters. "Why should we waste our time—they have made up their minds, and very little we can do will ever change that," said Norman Hand, the district's business manager. The vast majority of districts surveyed for this Bulletin use a campaign targeting identified YES voters. Their rationale is that if they turn out a high enough percentage of their "party of YES" then they will have enough votes to carry an election. And for many districts a formula such as the "fail-safe method" proves valuable in determining a voter-support threshold necessary for victory (see story, this page).

Research by Henry (1987), director of the South Carolina School Boards Association, supports the effectiveness of targeting school finance campaigns at YES voters. In a study of South Carolina referenda campaigns, she found that 84 percent of the successful campaigns identified and targeted YES voters, while only 56 percent of losing campaigns had done the same.

The NO Voter

Campaigns that target the YES voter can work just fine save one small detail: You must be able to identify enough YES voters! Unique demographic shifts in some districts as well as a national decline in the number of people fitting the traditional YES voter profile have created a new campaign context for some districts. Census data show that people with no school-age children make up 73 percent of the population in the average community, a significantly higher sum than a mere ten years ago. Many communities, for instance, have experienced a large influx of retirees into their communities.

Although attempting to sway NO voters presents an added challenge, there are specific campaign approaches for changing a NO into a YES. Often unfamiliarity with the issues and misunderstanding of the taxation request are disguised as a NO attitude; for these people a clear, tangible explanation is all that is needed. The growing national concern over education also lends

optimism that other NO voters are beginning to see the community and societywide impact of quality education. Says Douglas County's Eisenhauer, "There is a national sentiment that schools are crucial and that they are in a precarious situation now—I think districts can ride that wave of support."

Perhaps the second strongest cause of voting against school finance issues (right after opposition to higher taxes) is a sense of alienation from the issue (Piele). Community members who have no contact with the schools outside of election time and who do not perceive a connection between themselves and the schools will likely vote NO. Building bridges to the "alienated voter" involves far greater personal contact and creative activities or events that draw these voters into contact with the schools.

Superintendent Scott Mutchie of the Bend (Oregon) School District, on the other hand, simply disagrees with a school campaign that neglects certain segments of a community, such as identified NO voters. Philosophically, Mutchie believes a school district must be accountable to all community members, supporters and not, and a likely NO vote is all the more reason to find out why that person is a nonsupporter. "We feel our schools are community property and attempt to involve every sector of the community as share-holders in the schools," he said.

States Mutchie, "Most people write off senior citizens as solid NO voters, but we have found them to be some of our best resources." NO voters can be won over, he believes, but it requires a greater commitment to contact them personally.

UNDECIDED ≠ 50/50

Note of caution: According to Moore Information, Inc., of Eugene, Oregon, persons polled who call themselves undecided on a tax issue unfortunately end up voting against the issue if no positive message affects them otherwise. Therefore, be careful not to count undecided voters as 50-50 swing voters. But at the same time realize that they are challenging you, by virtue of their undecided status, to make a persuasive argument for additional funding.

Confronting the Opposition

School districts, thankfully, rarely face organized opposition and can take certain steps to keep it that way. Ironically, it is often a misguided school finance campaign itself that calls out an opposition. Factors prompting an organized opposition might include less than unanimous school board support for an election, a non-child-centered campaign, or conflict in the community.

Certain issues, such as sex education, desegregation, and political turf disputes, can create tension in a community that leads to greater voter turnout and more emotionally based voting, according to Piele. And, he adds, "the greater a community's level of organized opposition, the more likely is defeat of school financial elections."

How does a district keep opposition from forming? Most important, conduct a low-key, child-centered campaign. "We try to stay low-key at all times, trying to not give the media anything that might create hysteria, and we don't engage in any confrontational politics or debate of any sort," said

Once a Fan, Always a Fan

Autumn in the small Nelsonville-York School District in southern Ohio means two things: a winning football team and a struggle to pass a tax levy at the polls. In 1982, with ample seating capacity at the stadium and an active booster club, head football coach Dave Boston hit upon an idea: Distribute free season tickets to all senior citizens in the district and have booster club members transport the elder fans to and from the games in school buses. Soon, the stands were filled and the senior citizen community had a connection to its high school.

Let's Talk

Bend School District administrators Scott Mutchie and Allan Frickey are always getting into other people's space but they say they have to do it. "As a school district, we have to get into other people's space, on their own turf, in order to get them involved in the schools and understand our needs," said Mutchie.

Routinely, the two will contact known school supporters and ask if they will host a neighborhood forum in their homes where neighbors can discuss school issues with the superintendent and assistant superintendent. "We don't shy away from any group, and have found that these personal community outreach attempts through the Let's Talk program have been very successful," Mutchie added.

Hand. The Hood River School District also trains its staff to be positive and nonprovocative with citizens and to refer all complaints and arguments to the central office.

If opposition does arise, however, there is reason for more careful campaigning. If key individuals initially surface as opponents, then one-on-one meetings with the superintendent can often resolve the issues and stem off the opposition. If the opposition is already organized, more often than not it will seek a public forum in order to polarize the community. Avoid confrontation in the media. And if a showdown occurs, do not become reactionary or get distracted from focusing on the children. A school board member who faced a hostile opposition understands the tendency to react:

> You will read lies in the paper, hear lies on the radio and TV, and get them in the mail. My first instinct was to reply publically to every one. This is a stupid reaction. Don't try to answer your critics. You may reply to all accusations privately to individuals and have your supporters do the same but do not play the reacting game. You will lose credibility. They are not responsible to the public—you are. (Puzey 1988)

Like a boxer staying away from his opponent, a school finance campaign must avoid confrontation, and each time the opposition lunges with a wild and unfounded attack, a crisp response at the right time is enough to make them look foolish.

Chapter 5

Campaign Strategies

Successful school election campaigns differ little from their political counterparts when it comes to communicating with the public. Wise campaign strategists follow the KISS principle: Keep It Simple Stupid. This maxim is especially important in school finance elections, which revolve around complex budgetary issues. Sure, a completely informed voter would read the budget document, evaluate the complexities of school needs versus projected revenues, assess those needs on the basis of his or her own educational values, and make a decision. But let's face it, even according to the most romanticized version of democratic participation, the public doesn't analyze school budgets. People want easy-to-understand, condensed, graphic portrayals of the issues at hand; they want a tangible argument that takes five minutes or less to evaluate.

The colorful graphics and simple statistics of *USA Today* are no mere media anomaly, but a direct information delivery style patterned to the public's taste. TV news programs likewise avoid complexity, instead catering to the public's attention span by packaging the news into one- to two-minute sound-bytes. School finance campaigns, which play to the same audience, can benefit from adopting these same communication strategies. Interestingly, Piele and Hall found that favorable newspaper coverage and longer campaign durations were associated with favorable outcomes, but the amount of information the school districts put out had no correlation to election success. Don't overwhelm the voter, therefore, but keep your message before the voter and conduct a forthright campaign.

Communicating the Message

You know what your message is, so how do you now get it across? If your fundraising activities netted over $1 million, hire Ed McMahon and launch a full-blown TV campaign. Precisely because school districts don't have $1 million, let alone $10,000, in campaign funds, school campaigns instead must rely on a variety of low-cost and extremely creative advertising

techniques. And it is this very combination of low-budget ads, volunteer enthusiasm, direct voter contact, and mass media appeals that signifies a school finance campaign, often creating a persuasiveness that even a $1 million ad campaign would find tough to match. Experience dictates that it is not necessarily sophistication that wins school elections, but rather appropriately using the means available in creating a diversified grassroots campaign. Largesse is not necessarily better!

Common to the particular campaign strategies presented in this chapter are several themes. All voter communication must remain connected to its specific audience—your neighbors, friends, fellow townspeople—and specifically their children, all of whom will still be your neighbors and friends long after the election is over. In all communication, furthermore, portray education as an investment rather than an expenditure, and use dollar comparisons to reveal the budgetary issue (see "What Is a High School Diploma Worth?" below).

Cultivate a perception of openness and honesty in your advertising, while focusing on the large issues, such as quality education, instead of specific budget details. The following strategies are not presented in order of importance, nor is any single method of communication said to be sufficient in and of itself. Yet taken as a whole, the following strategies constitute a well-rounded, sound campaign.

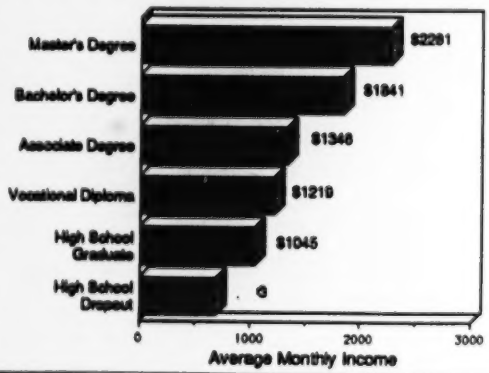
Presenting the Budget

In the attempt to be open with the public, districts must resist the temptation to present the budget in all its complexity; few community members have the interest or the ability to dissect a school budget. In fact, too zealous an "open budget presentation" can be counterproductive. "They (voters) are down on what they're not up on," says Scott Mutchie, superintendent of Bend (Oregon) School District. According to Mutchie, you must

What Is a High School Diploma Worth?

What will a graduate from the local high school return to the community in economic terms? How will a strong college-prep program translate into future economic earnings for our children? From the following income statistics one can make a persuasive argument that a tax dollar invested today in education will be rewarded by graduates with strong earning power who will make it an economically strong community tomorrow.

Source: "What It's Worth: Educational Background and Economic Status," U.S. Census Bureau, 1987



Personalize the Financial Impact

If the Market Value of Your Home is:	The New Referenda would add to Your Taxes per year:
$40,000	$5.00
$60,000	$7.00
$80,000	$9.00

demonstrate your budgetary need to the public but in such a manner that makes the dollar requests tangible.

Hood River (Oregon) School District makes its budget requests "real" through a published list of what a funding request translates into in terms of per pupil expenditure, computers per classroom, increase in individualized instructional contact, and so forth. The same trait that makes *USA Today's* colorful graphs and statistics so appealing can likewise make a school budget understandable.

An obvious taxpayer concern in any finance election is What will it cost me? Use the opportunity to break down the tax increases into real dollar amounts for selected property values, but go the additional step of comparing the additional amount per month to the cost of another commodity in the community. For instance, building a new elementary school costs $.75 a month per $50,000 assessed value, which is less than a pack of cigarettes costs.

Many districts have had success profiling how a tax increase will financially affect a recognizable community member and why they still support the referenda. Not only might such a personal testimonial generate a "Neighbor see, Neighbor do" attitude, but if a taxpayer with a high property value is portrayed as supportive, it will show that those most taxed are still committed to the schools.

Keep in mind that budgetary expenditures, school salaries, expenditures per pupil, class sizes, and so forth mean little to the taxpayer without comparison to other districts. For example, the Columbus (Ohio) Public Schools told its taxpayers they "are getting more for less" because their district "spends less than most urban districts—$3,406 per student (Cleveland spends $4,256)" (Campbell 1989). Take every advantage to depict your district's fiscal health relative to other districts.

Sample Taxpayer Profile

Mr. and Mrs. Smith's home has a market value of $80,000. Therefore, they estimate its equalized assessed value at $23,040. The equalized assessed value divided by 100 is $230.40. This figure, multiplied by the proposed tax rate increase of .075 is $172.80. So, if both referendum propositions pass, the Smith family will contribute about $173 more per year in taxes to their school district. This will raise their annual school district tax contribution to about $685.

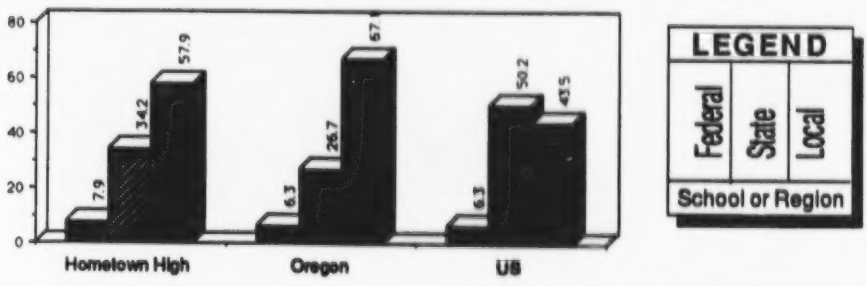
The Smiths have two children in school. *The school district spends more than $6,400 per year to educate the Smith children.* The Smith family knows education is a value as well as a cost, so they feel, even with the tax increase, they are getting a bargain!

Source: Campbell (1989)

The use of graphics and statistics in an election follows a simple rule: Showcase them if they help your cause; avoid them if they do not. Effective use of comparison graphics, such as those appearing below, requires comparing statistics in your district with other relevant data. For example, in some instances a neighboring school district presents a worthwhile comparison provided, of course, their own campaign efforts are not jeopardized. At all times employ figures that can be defended, but creatively portray your district as achieving great things while operating at a significant financial disadvantage.

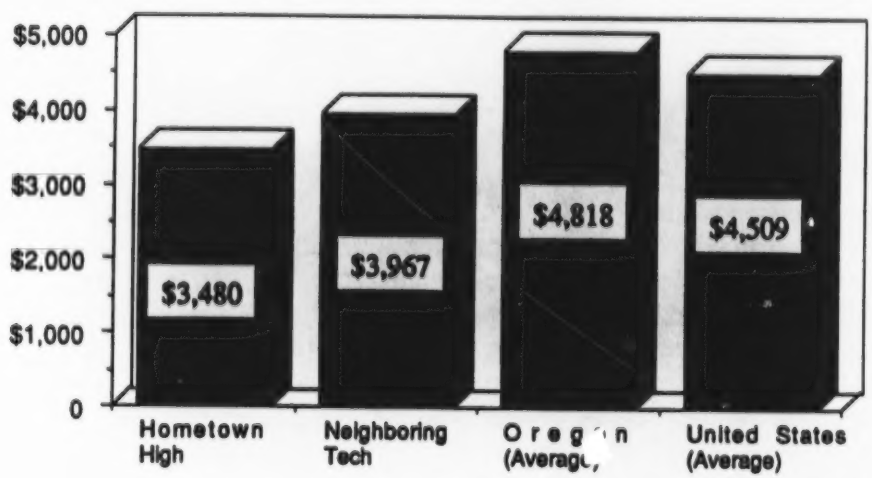
The following statistics are from 1988 data except for the obvious symbolic figures created for comparison.

State vs. Local Funding



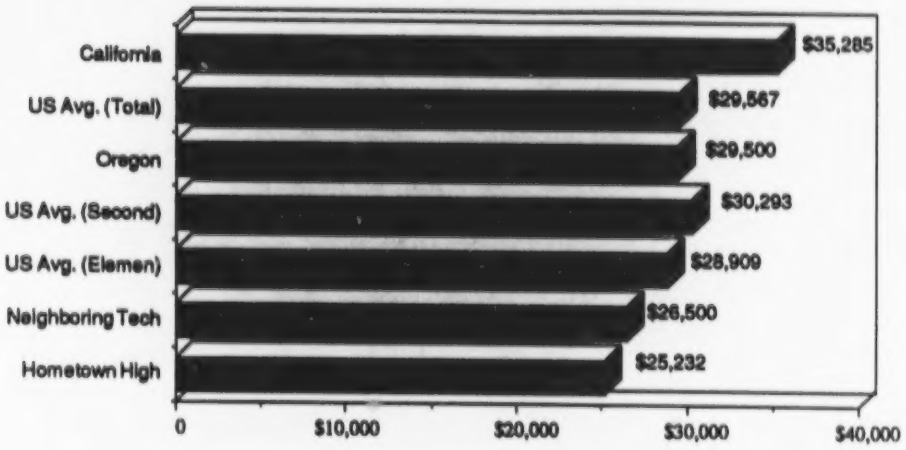
Source: National Education Association in Oglesby and Shannon (1989)

Expenditure Per Student



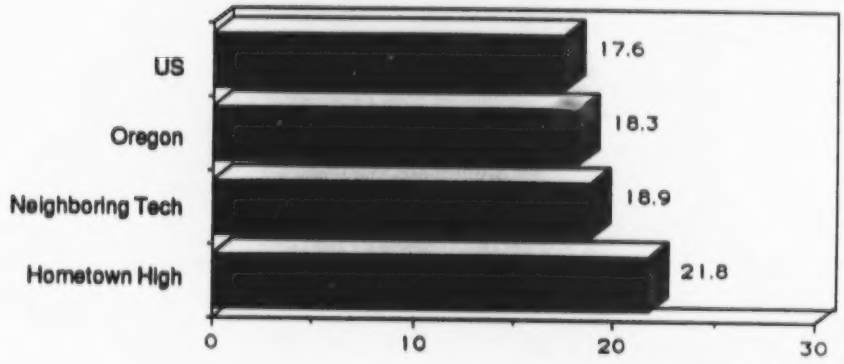
Source: National Education Association in Oglesby and Shannon (1989)

Teacher Salary Comparisons



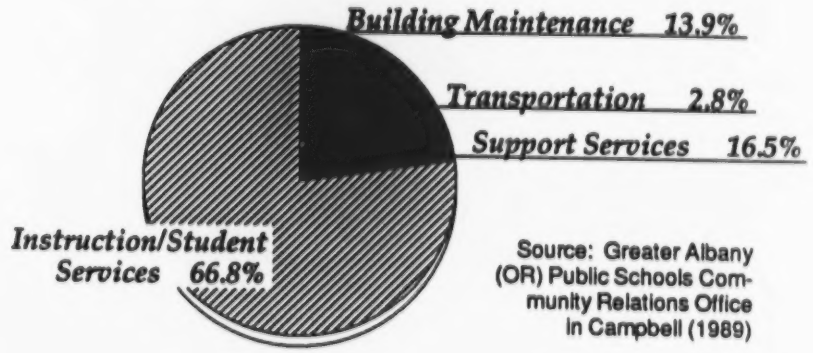
Source: National Education Association in Oglesby and Shannon (1989)

Teacher/Pupil Ratios



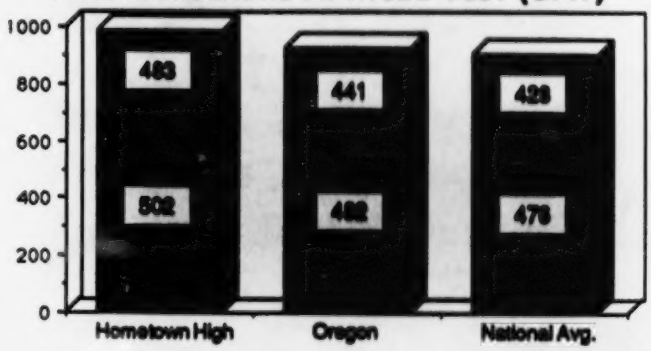
Source: National Education Association in Oglesby and Shannon (1989)

Where the Money Goes



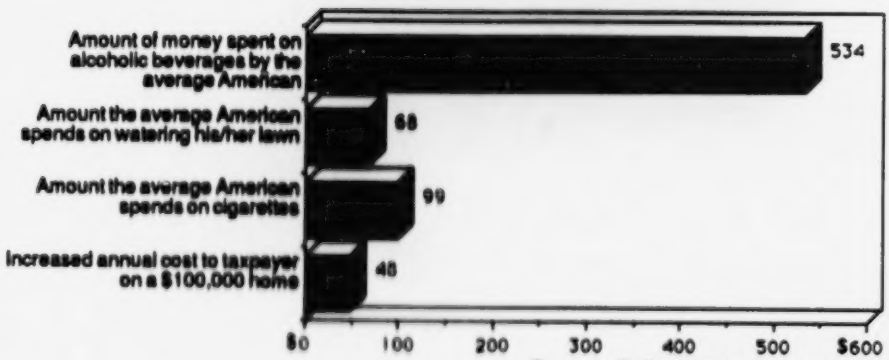
Source: Greater Albany (OR) Public Schools Community Relations Office in Campbell (1989)

TEST SCORES (COMPARISON)
1988 SCHOLASTIC APTITUDE TEST (SAT)



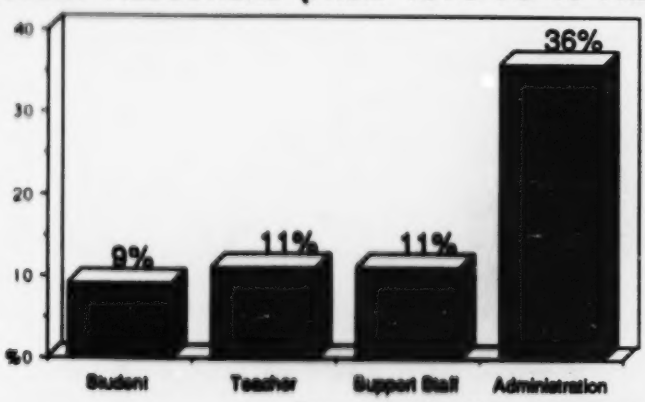
Source: College Board
In Oglesby and Shannon (1989)

How Much Does It Cost?



Source: Estimates by Author (created for effect)

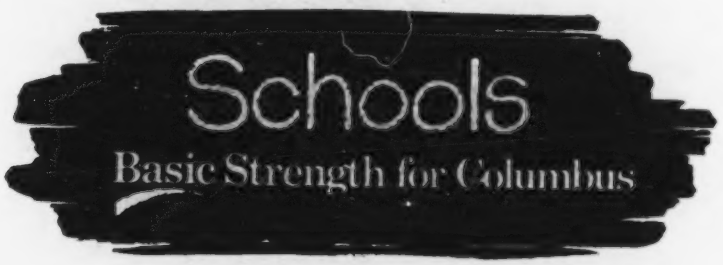
STAFF/STUDENT REDUCTIONS (FROM 1978-79 TO PRESENT)

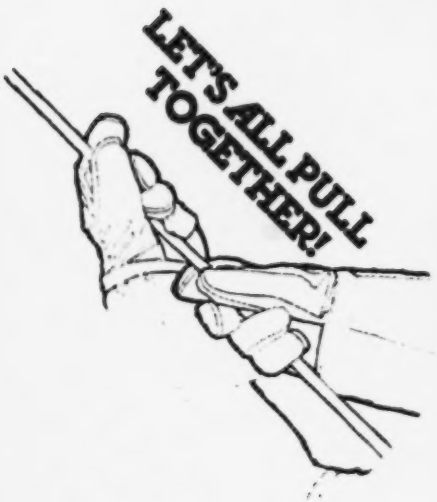


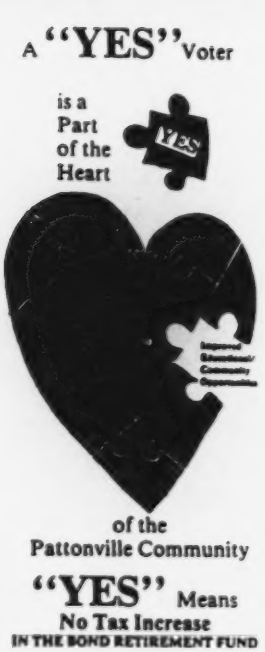
Source: Greater Albany (OR) Public Schools
Community Relations Office
In Campbell (1989)

The Campaign Logo and Slogan

"Nothing can kill a campaign quicker than a bad slogan," says Mutchie of Bend, Oregon. And nothing can provide a better rallying point, either. Quick on the heels of an election announcement is the presentation of a campaign logo and slogan, and it is that little symbol that will inevitably become the most repeated concept in the election. The Fairfax County (Virginia) School District developed the theme "Fairfax County Loves Its Schools" the moment a citizen's committee was formed. "We designed a heart-shaped red apple with the theme slogan wrapped around it. We ordered buttons, bumper stickers, campaign stationery, and news release stationery all with this slogan before the campaign even began," writes George Hamel (1984), director of community relations.







A Lawn Sign Is Worth 1.4 Votes?

Research uncovered by California's Elk Grove Unified School District found that a lawn sign will secure approximately 1.4 votes per household! Whether a lawn sign prompts one YES vote or ten, an organized lawn sign program does give the impression of neighborhood support and YES voter solidarity.

Gain approval for geographically balanced lawn placements throughout the district two weeks prior to their placement, then install them all in an overnight posting—the visual impact will be impressive.

Source: Chang and Albiani (1987)

Publications

The old adage of "Know your audience" is particularly applicable to school finance campaign literature. Although there are potentially as many different communication methods as there are creative minds in your district, it is crucial that all communication be patterned to the audience it is intended to address. Ever conscious of distinct audiences in any school district, the following are examples of popular written communiques that school districts have used with success.

The School Newspaper

Student support in a school finance campaign is an often-overlooked resource. Students are motivated if they feel school improvements are directed at their well-being, and a student-produced publication appeals to parents and nonparents alike. Be sure, however, that a disclaimer appears in any school-related publication, stating that it was produced with volunteer time and funds.

The Fact Sheet

A well-written, factual document gets the campaign off to a good start, because it gives your own volunteer staff access to the "facts" as well as sets an open and honest informative tone for the campaign. Some community members feel a need to know the budgetary details and overall financial picture, and for them there is no substitute for the factual document. The trick is to prepare an indepth, information-packed document for the detail hound, yet keep it readable and understandable enough for the typical voter. A good fact sheet effectively decodes the school budget and gives the necessary information in a brief, accurate, and honest manner.

Many styles work for the fact sheet, including a question-and-answer format; graphic representations are always appealing. Most questions in a school finance campaign are predictable; a question-and-answer format can defuse many potential campaign criticisms or provide a context for addressing campaign issues that the public might not otherwise notice. The following are some of the most common questions asked in a school referenda:

- Where does the money come from to support our schools?
- What is the current millage rate?
- How much does the tax request mean in terms of increased taxes on my property?
- What are the enrollment trends in the district over the last five years?
- Why does the budget continue to escalate at substantial rates when we have fewer children in our schools?
- How do our district's facilities compare to those in an equivalent district?
- Has local school funding kept pace with inflation and other school costs?
- All budgets have "fat." Where is ours and what is being done about it?
- What is the student-to-professional staff ratio?
- What are the average class sizes?

- Where and why do we have some very small class sizes?
- How do our student/teacher ratios compare to other districts?
- What is our cost per pupil? How does it compare with other districts?
- Are we getting as much outside funding as possible?
- Does our small district require we pay more to support our children's education?
- What was the total budget for this year?
- Those dollars represent an increase of what percent over the previous year?
- What has been the relationship of inflation to increases in appropriation to the schools over the past five years?
- How well do our children do on standardized test scores?
- What percentage of the budget goes to salaries and fringe benefits?
- How do our teacher's salaries compare to other districts in the state? In the country?
- What will passing the referenda mean in actual benefits to our children?
- Why should the community support the levy?

(Adapted from William Goldstein 1984)

For an example of a sample question-and-answer fact sheet, see Appendix C.)

Voting Information

The bottom line in any election is whether or not the desired ballot square is punched. To ensure that your YES voters are not kept from voting due to misunderstanding the voting procedure, make every effort to instruct the voters on where, when, and how they should vote.

Mailing labels of voters by precinct are available from the local board of elections, making it possible to send voters specific instructions on where and when they can vote. In addition, mailing sample ballots with instructions on how to vote can alleviate much of the confusion that often accompanies complexly worded ballots. (See the sample ballot reproduced in Appendix D.)

The Campaign Contribution Letter

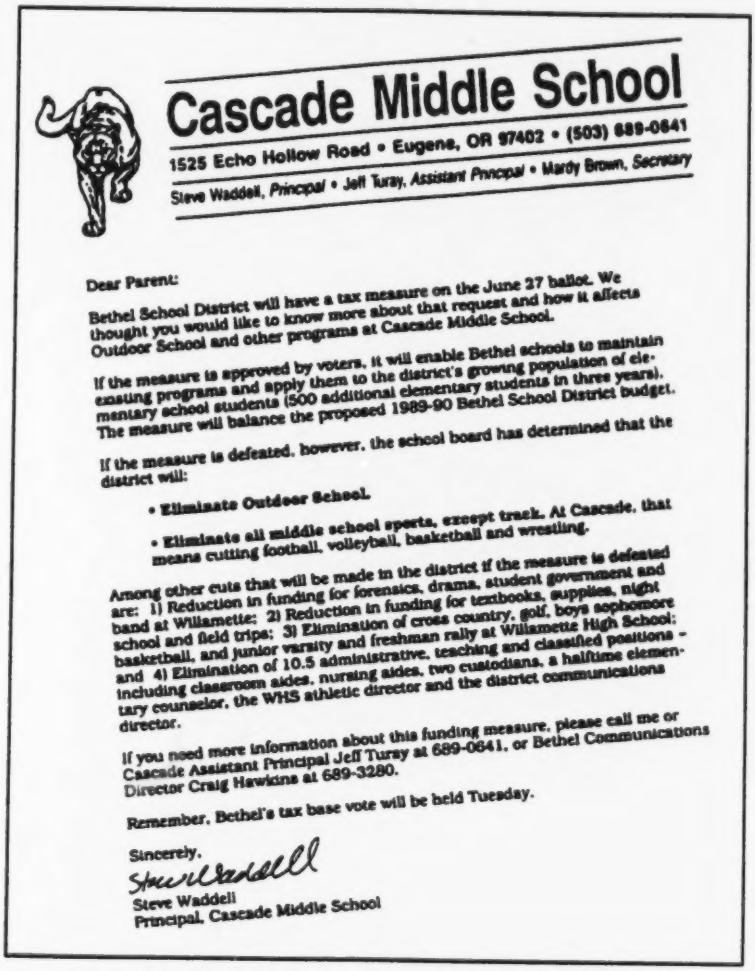
A written campaign contribution appeal can be included in a volunteer recruiting letter that is distributed through a mass mailing or sent to targeted groups.

Targeted Mailings

The following is a partial list of community voting groups a district

may wish to target:

Letter to Parents. Parents are a district's most solid YES voting block. Appeals targeting issues directly affecting their children in their specific school are effective in getting the vote out. One method is to have each principal write a letter to the parents of children in his or her school (see the accompanying example of a middel school principal's letter). For parents of elementary children, the letter should emphasize the benefits projected over the children's next seven to thirteen years in the school system.



Cascade Middle School

1525 Echo Hollow Road • Eugene, OR 97402 • (503) 689-0641

Steve Waddell, *Principal* • Jeff Turay, *Assistant Principal* • Mardy Brown, *Secretary*

Dear Parent:

Bethel School District will have a tax measure on the June 27 ballot. We thought you would like to know more about that request and how it affects Outdoor School and other programs at Cascade Middle School.

If the measure is approved by voters, it will enable Bethel schools to maintain existing programs and apply them to the district's growing population of elementary school students (500 additional elementary students in three years). The measure will balance the proposed 1989-90 Bethel School District budget.

If the measure is defeated, however, the school board has determined that the district will:

- **Eliminate Outdoor School.**
- **Eliminate all middle school sports, except track. At Cascade, that** means cutting football, volleyball, basketball and wrestling.

Among other cuts that will be made in the district if the measure is defeated are: 1) Reduction in funding for forensics, drama, student government and band at Willamette; 2) Reduction in funding for textbooks, supplies, night school and field trips; 3) Elimination of cross country, golf, boys sophomore basketball, and junior varsity and freshman rally at Willamette High School; and 4) Elimination of 10.5 administrative, teaching and classified positions - including classroom aides, nursing aides, two custodians, a halftime elementary counselor, the WHS athletic director and the district communications director.

If you need more information about this funding measure, please call me or Cascade Assistant Principal Jeff Turay at 689-0641, or Bethel Communications Director Craig Hawkins at 689-3280.

Remember, Bethel's tax base vote will be held Tuesday.

Sincerely,

Steve Waddell

Steve Waddell
Principal, Cascade Middle School

One of the targeted letters from principals.

Identified NO voters. This letter may include a testimonial from a former NO voter who now votes YES and give convincing reasons why the recipients should become school supporters as well. Understand, however, the uphill battle a district faces in trying to persuade NO voters to change

their minds, and evaluate whether the time and mailing costs are worth the effort.

Identified YES voters who did not vote in the last election. This mailing could emphasize the recipients' importance to the campaign by noting the number of supporters who did not vote in the last losing election and their potential to swing the election.

Senior Citizens can receive a special mailer from a respected retiree in the community that focuses on issues important to senior citizens.

Republicans and Democrats receive literature from their respective local party leaders.

Large local employers supportive of the schools can emphasize the important link between strong schools and the company's continued economic well-being in the area.

The Media

Good press relations are the backbone of most school finance campaigns. And learning how to use the media to the district's advantage begins with understanding how the media operates.

Timing is all important to a reporter or news crew: A publicity event must occur at least two hours prior to the filing deadline or the story won't get filed and it will be old news by tomorrow. You can also endear yourself to newspersons by providing complete information and documentation so the reporter will not have to make additional fact-finding phone calls or interviews.

Journalists, as a rule, are also truth hounds (remember Watergate) who become hypermotivated to probe deeper the moment they sense a district is holding back or covering up information. Don't give your local school beat reporters a chance at a Pulitzer prize.

Many school campaigns find it necessary to appoint a chief spokesperson for the campaign primarily to ensure that the media receives a planned and nonrepetitive flow of information from the school district. Inarticulate or, worse, conflicting quotes are detrimental to school campaigns. A spokesperson can also take the initiative in contacting the press concerning campaign issues and help orchestrate the all-important timing of media stories (see story, this page).

The local town newspaper can be considered the front line of a school referendum campaign battle, and in a campaign war waged with worded arguments the Letters to the Editor and paid advertising sections are where the skirmishes occur. Thus, it is important to solicit reliable Letters to the Editor writers early in the

Timing Is of the Essence

"Elizabeth Hammans walked into her new kindergarten classroom on Tuesday, ignored the absence of desks and chairs, and voiced her concern. 'When are we going to start learning stuff?'" Such is the lead of a Eugene, Oregon, *Register-Guard* front page article on the Bethel School District, which just happened to run the same day Bethel residents received their vote-by-mail ballots for a school bond issue. That the article, entitled "Crowded School Forced to Improvise," ran on that date evidences a cultivated working relationship between the district and the local media.

Adapted from the *Register-Guard* (Wright September 5, 1989)

campaign. In addition to well-reasoned letters, compilations of supportive quotes by respected community members can communicate information as well as demonstrate community support.

Evaluation

A future school finance campaign is the last thing anyone wants to think about following a school referendum election. The first step toward a successful next election, unfortunately, begins the day following the last election.

Besides writing thank-you notes to campaign volunteers and supporters, the wise district busily attempts to determine which of its campaign techniques lead to YES votes on the ballot. All materials used in the campaign should go into the newly created postelection file, plus the following feedback information:

- Copies of any materials developed by groups opposing the election
- Written summaries by precinct coordinators on their impressions of the campaign, including impressions on what did and did not work
- A precinct-by-precinct voting tabulation
- A survey of voters on what issues and arguments persuaded them to vote either YES or NO

Oregon's Bethel School District knows the value of postelection evaluation. The morning after a disappointing 1989 tax levy defeat, Bethel officials began evaluating why they had lost. A check of precinct voting results combined with a voter survey showed that a higher percentage of YES votes were cast in every precinct compared to the district's recent election history. "I was upset on election night, but after I got a chance to review how well we had done, I was ready to go again," said campaign cochair Araminta Townley. This defeat provided Bethel with the necessary information to structure a revised campaign strategy that would carry the district to two consecutive successful referenda over the next three months.

Conclusion

Hopefully, this Bulletin will be the launching point for your next victory at the polls. The preceding anecdotes, examples, theories, and strategies from various school finance campaigns collectively present a model for election success.

Throughout the previous pages, one theme should have become apparent: Despite the consensus on successful techniques, such as targeting the YES voter and direct voter contact, each school district, and each separate campaign, is unique, and requires a unique response. Success or failure at the polls is more often a result of understanding and identifying the community's particular voter groups and adapting a strategy to match than anything else.

School districts with successful experience in finance campaigns overwhelmingly have a sound, year-round public relations program and have worked at knowing and identifying their supporters for campaign purposes. Referenda veterans know that elections are not decided in a three- to six-month campaign, but are built on a sustained relationship with one's public.

A well-orchestrated campaign remains the "winning" trump card, however. Recommended campaign traits include conducting child-centered, honest, not overly complex, YES-voter intensive campaigns, while avoiding teacher salary and benefits issues.

The savvy school campaign strategist takes the wealth of information provided here as well as insights gained from other districts and then adapts the techniques to fit his or her own district's unique circumstances. Inevitably, then, the campaign becomes a blending of community resources pooled for one end—better schools for a better community. The campaign team will include volunteers, parents, professional consultants, teachers, and politicial officials operating within the campaign strategy chosen at the election's outset.

This Bulletin provides a potpourri of different strategies potentially applicable to any given election. The two case studies in Appendices E and F give a more indepth look at how two school districts prepared for, organized, campaigned for, and ultimately passed their referenda. The Appendix

also contains a sample newspaper advertisement using quotes from community supporters (Appendix G) and a sample precinct reporting sheet (Appendix H).

Also, contact other school districts for detailed descriptions of how they succeeded at the polls. School personnel who have been through a school finance campaign are motherlodes of information, and are generally eager to tell you what worked—and what didn't—and what they would do again if given the chance.

Appendix A:

The Nine-Month School Finance Campaign Planner

9 months before election day:

- Discuss the financial need for an election.
- Informally contact the community "movers and shakers" for their input and possible commitment to volunteer.
- Develop campaign logo and philosophical perspective on the campaign.
- Begin research on past election trends.
- Conduct voter surveys focusing on perceptions of the schools and level of supportable tax requests.
- Compile data on voter identification.
- Informally recruit and solidify your campaign "inner circle."
- Initiate discussion with the private sector and other external funding sources to develop matching fund pledges, funding partnerships, and so forth.

8 months before:

- Stage your Campaign Kickoff Celebration.
- Contact schools districts that have just completed campaigns and request ideas, campaign materials, insight, perceived voter trends, and so forth.

6 months before:

- Form Tax Planning Team to look at possible tax structuring and determine election dates.
- Develop a fact sheet for the campaign.
- Complete community surveys and analyze the data.
- Launch voter registration drive.
- Begin active coalition building campaign.
- Recruit volunteers and solicit campaign funding.
- Complete identification of and map out all the voters in the district.
- Order all informational and promotional materials.

5 months before:

- Form the all-important steering committee.
- Establish and train your speakers bureau and slide presenters.

4 months before:

- Prepare and disseminate informational packets to all teachers, school staff, volunteers, and influential community members.
- Prepare and disseminate media informational packets (can be the same as your staff's informational packets, but often may include publication-ready materials).
- Organize the individual school campaign committees and coordinate canvassing, telephone outreach, and mailing efforts among the different arms of the campaign.
- Immediately begin recruitment of precinct volunteers.
- Enlist and train the community presentation teams, including familiarization with video aids.

3 months before:

- Conduct followup enumeration activities to determine YES, NO, and undecided voters.
- Hold mailing party for campaign brouchures.
- Schedule presentations for local service clubs, church groups, and other target organizations in the community.

2 months before:

- Complete voter registration drive with a final push.
- Attempt to hold parent-teacher conferences now and use the op-

portunity to register parents and solidify parental support.
- Complete campaign fundraising activities with a final gala event and then determine your media advertising schedule based on available funds.
- Remember to make the campaigning FUN—reinforce the team concept and feelings of solidarity through motivation-building activities.

6 weeks before:
- Hold media briefings. Stage creative events aimed at communicating a specific message to the community.
- Begin door-to-door canvassing; at a canvassing kickoff celebration, hold motivational social and educational events for your volunteers and staff.
- Distribute lawn signs to interested community members.

4 weeks before:
- Contact local businesses for advertising space.
- Plan and purchase newspaper, radio, and television advertising space for the week preceding the election. All ads should be camera ready by this time.
- Tape radio and TV spots with targeting pitches.
- Briefly target absentee voters just as the ballots go out. Attempt to identify absentee voters and conduct a direct-mail campaign.

3 weeks before:
- Reevaluate campaign strategies and adapt tactics as necessary.
- Hold open houses in schools.

2 weeks before:
- Send all churches copy for their Sunday bulletins for the week preceding the election.
- Post billboards.
- Distribute fliers.

10 days before:
- Begin newspaper, radio, and TV ads now and build up to election day.
- Begin countdown activities in the schools and the community.
- Make victory party preparations.

5 days before:
- Time targeted mailings to arrive just before the election.
- Establish telephone banks.
- Conduct final door-to-door canvassing the weekend before the election.
- Finalize preparations for the day-before and election-day strategies, including assignment of specific volunteer duties.

The day before:
- Aim telephone campaign at contacting every YES and undecided voter in the district.
- Media exposure peaks today.

ELECTION DAY:
- Poll watchers check off arrival of desired voters.
- Place reminder calls in the late afternoon to those desired voters who haven't yet voted.
- Hold the election party and victory celebration.

Followup after the election:
- Enter the election data into your growing district voting database.
- Analyze voting behavior by various indicators to get immediate feedback on the success of your campaign strategies. And be sure to record your findings for the next time.
- Send thank you notes to all workers and school staff.

Appendix B:

Generic Enumeration Polling Script

"Hello, this is _____ and I'm a community volunteer calling for (Friends of Spring Valley Schools). The school board has set (election date) for a finance election to ask voters to approve a (millage request) in order to continue our quality schools. Are you already aware of the upcoming election?"

If the response is considered

Favorable or Unaware: Continue with the interview.

Unfavorable: Ask for their feedback on why they will not support the schools this election, ask if they would like to discuss further with an official school representative, thank them for their time, and hang up. DO NOT ENGAGE THE VOTER IN DEBATE UNDER ANY CIRCUMSTANCES.

"As you may know, our school district (some positive feature of the school district) but last year our school district's enrollment jumped by 300 children while our average teacher pay fell to the bottom third percentile in the state. The (property tax levy) will only cost the average property owner with a $50,000 home an additional $0.00 a year. Do you feel this is a justified cost to (what the request pays for?)"

Repeat the above

1. Are you planning to vote, then, on (date of the election?)

YES _____
NO _____ If NO, try to discover the reason.

If there is no record of the person as a registered voter:

2. Since you are planning to vote, are you a registered voter in Spring Valley County?

YES _____
NO _____

If the answer to (2) is NO:

3. Would you like one of our voter registration volunteers to bring the registration materials to your home or send them to you?

Home _____

O.K. What is your address and when is a good time to find you at home?
Address _____
Time _____
Mail _____

NO _____

4. For some people, it is impossible for them to come to the polls on election day because they are going to be out of town or they need transportation. Is it possible that you need transportation, or would you like an application for an absentee ballot?

Transportation _____

What would be a convenient time for you to vote on (date of election?) Either schedule a time now or tell the voter transportation will be arranged closer to election time.

Address _____ Time _____

Absentee Ballot _____

How many in the household need ballots? _____

O.K. The absentee ballot will arrive around (date of mailing) and must be returned by _____. You can support Spring Valley schools by voting YES on (issue) and punching out hole number _____.

5. Do you have any questions about the upcoming election that I might be able to answer?

The volunteer may attempt to answer or, better, refer the question to a school official.

You ask a good question, and it would be best if the school (superintendent or business manager, Ms. X) responded directly to you. When would be a good time for him/her to call?
Date _____ Time _____

Assume that every identified YES voter is a potential campaign volunteer as well.

6. It is good to hear from community members like you who, like myself, appreciate our strong school system. I have been volunteering my time since _____ and, besides feeling good about the cause, I am having a fun time meeting and working with the other volunteers. Would you like to get involved with the (campaign slogan) by volunteering what time you can afford?

YES _____

Great. Our volunteer coordinator will call you very soon. Welcome aboard!

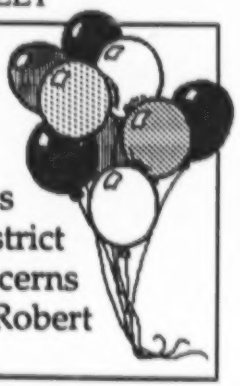
NO _____

7. Thank you for talking with me. Goodbye.

Adapted from "Bethel Did It!" (January 1990) and Campbell (1989)

Appendix C:

Sample Q and A Informative Fact Sheet



The inside story of School

District 146's March 15, 1988, referendum is in this fact sheet, which has been prepared especially for District 146 staff members. If you have any questions or concerns about the referendum, please call Superintendent Robert Procunier's ofice, 532-1771.

The Bare Facts

On Tuesday, March 15, 1988, polls will be open from 6 a.m. to 7 p.m. at all precinct polling places in district 146. ONLY registered voters who are residents of District 146 may vote in the referendum.

NOTE: The referendum is being held during the General Primary Election. People who wish to vote in the referendum but NOT in the party primaries may ask for a special, non-partisan ballot.

What will be on the referendum ballot?

Two propositions: one will seek approval of a 65-cent increase in the Education Fund tax rate, the other will ask for a 10-cent increase in the Operations, Building and Maintenance (OBM) Fund tax rate.

Why did the school board decide to have a referendum?

Even after cutting this year's budget—which resulted in larger class sizes in some schools—the school board didn't have enough money to cover spending from the Education Fund this year. The board was forced to borrow money to meet expenses. By the end of this school year, the Education Fund will be just under $900,000 in debt. There's a limit to what school districts can responsibly borrow, so if a source of new revenue isn't developed, next year's Education Fund spending will have to be cut again. *Before making more cuts in the educational program, the board decided to ask the community to vote it some help.*

Another school district budget fund—the OBM Fund—also is headed into debt. Rather than cut back on school repairs and maintenance, the school board is asking voters for increased support for that fund, too.

What can we expect if the Education Fund tax rate increase is not approved?

A school district budget isn't very different from a family budget. If expenses exceed income, there are two things a family can do: earn more money or do without some things.

If we can't "earn more money" through a local tax increase, our school will have to "do without" some things—about $1.6 million worth.

Unfortunately, these things which will have to be cut from the budget are the essentials: Teachers and other staff members, educational supplies and materials. Because about 80 percent of all Education Fund spending is for

personnel costs, it can be anticipated that the largest economies can be made in that area. As we employ fewer teachers and other staff, class sizes will become larger and some programs will have to be dropped completely. Without adequate supplies and materials, programs can't operate, or those that survive must "make do" with older or not enough materials.

Without the Education Fund rate increase, our schools will have to make major adjustments that will affect the quality of education in District 146.

What if the OBM Fund tax rate increase isn't passed?

As with the Education Fund, without sufficient income, spending must be cut. School repairs and maintenance will be cut back, except for those repairs that are absolutely essential to the health and safety of students and staff. Schools that look uncared-for send the message that education isn't valued by the community. Schools that aren't as nice and clean as they can be aren't very comfortable for children and teachers.

If the refendum succeeds, what will it cost the average taxpayer?

If *both* propositions succeed, the property tax increase on a residence with a market value of $80,000 would amount to about $173 a year, less than $3.50 a week, or less than 50 cents a day.

Of course, most homeowners pay their property taxes on a monthly basis, as part of a mortgage payment, so it may be more realistic to look at the cost-per-month. One hundred seventy-three dollars a year translates into about $14.50 a month.

This is just an estimate. The exact cost to any homeowner depends on the *assessed value* of the *tax multiplier* (sometimes called the equalizer) which is set by the state. The newest values for these won't be announced until summer 1988.

However, the important thing to remember is that *a tax rate is applied to each $100 of equalized assessed value* (not market value). If anyone needs more information about property taxes, they may call District 146, 532-1771, and the superintendent or assistant superintendent for businesses will answer questions.

If the referendum succeeds, the new tax rate can be applied on the property tax bills issued in August 1988.

But property taxes seem to be increasing all the time! Where is my money going?

District 146's Education Fund tax rate, now at $1.67, has not increased in 20 years. The OBM Fund rate never has been higher than 25 cents. Property taxes may increase because the assessed value of property increases, or because the multiplier increases, but not because of high tax rates in District 146. Our combined tax rate, for all funds, now stands at $2.22. *It is well below the Cook County average.*

Isn't there some kind of state funding available to help our schools?

The sad truth is that the State of Illinois has been cutting back on school funding and there's no indication that this trend will change.

Although the Illinois Constitution commits the state to providing 50 per cent of all school funds, this year, District 146 is receiving *only 20.4 per cent* of its revenue from the state. The Federal government contributes less than 2 per cent, so the major responsibility for financing education is on the people who live in the school community.

Neither the state nor the federal government has shown any inclination to "bail out" the schools in Illinois. *It is clear that local communities now are responsible for their own schools, and that local voters, not the state, will determine the quality and future direction of our schools.*

Appendix D:

Sample Ballot

OFFICIAL BALLOT

PATTONVILLE R-3 SCHOOL DISTRICT
ST. LOUIS COUNTY, MISSOURI
SPECIAL SCHOOL BOND ELECTION

Tuesday, the 4th day of February, 1986

PROPOSITION

Auditorium Complex

Shall the Board of Education of Pattonville R-3 School District, St. Louis County, Missouri, be authorized to incur an indebtedness of said District in the amount of Six Million, Five Hundred Thousand Dollars ($6,500,000) for the purpose of erecting a school house containing auditorium, classrooms and other educational facilities, building additions to and repairing old buildings, and furnishing schoolhouses in said District and purchasing transportation equipment for said District and to evidence such indebtedness by the issuance of bonds of said District in said amount for said purpose?

Computer System & Printing Equipment

Radio Communication System

Classroom Additions, Roof Repairs, Football Field Repair, Ventilation

YES ☐

NO ☐

(Instructions to voters: If you are in favor of the foregoing proposition, place an X in the box opposite "Yes." If you are opposed to the foregoing proposition, place an X in the box opposite "No.")

The Bond Retirement Fund, or debt service fund, is the portion of the district's tax levy which can only be used to pay back the principal and interest on the bonds which investors have purchased to finance district building projects and major equipment purchases.

To Register To Vote... Any resident who will be 18 on, or by, February 4 can register to vote at any county library, city hall or Pattonville building during regular work hours.

Source: Campbell (1989)

Appendix E:
Case Study—Large School District

Case Study:
Large School District, Bond Referendum

'Better schools for a better tomorrow'
Bond Referendum Campaign
Dade County Schools, Miami, Fla.

On March 8, 1988, the people of Dade County, Fla., approved a $980 million bond issue—the largest school bond issue ever approved in the U.S.—to help fund the construction of 49 new schools and the renovation of each of the community's 259 existing schools. The need for the construction and renovation project was established in a 1987 survey by the Florida Department of Education.

According to the survey, fast-growing Dade County, which comprises Miami and its suburbs, would become overcrowded by 82,500 students within four years unless some drastic measures were taken to remedy the situation.

Of four options (including placing schools on double sessions and slashing the district's operating budget), the school board chose the construction/renovation route. The cost was estimated at $1.53 billion, of which the district could guarantee access to only $50 million. That left a shortfall Dade county's property owners would be asked to pay through the bond issue.

Assessment

The challenge to Dade County Public Schools was to convince voters the need for the construction project was real and the bond issue was the best way to complete funding for the project.

To gauge public awareness of the need and public support for the bond issue, the school system commissioned a telephone poll. The United Teachers of Dade, the labor union representing the district's teachers and other employees, commissioned two subsequent surveys.

The initial poll was conducted in August and September 1987. It revealed, among other findings, a majority of respondents recognized the need to build new schools and renovate existing ones. It also revealed broad support for a bond issue as a means for financing the construction and renovation project.

Subsequent polls, conducted in November 1987 and February 1988, supported these findings. All three surveys provided information used in targeting important publics—particularly black, Hispanic and elderly citizens.

Planning

To implement the bond referendum campaign, the school board enlisted the help of key entities—the United teachers of Dade, the Dade County PTA and community's business establishment.

"Better Schools for a Better Tomorrow," a political action committee independent of the school board, was formed to organize the business community, to raise funds and to actively advocate passage of the bond issue.

Legally the school district and its employees were prohibited from actually urging citizens to vote for the bond issue; how-

ever, the district could communicate objectively the need for the construction project, the reasons why the bond issue was the best method for raising the needed funds, and the consequences faced by the community should the construction project not be able to proceed.

The campaign, therefore, was structured as a two-step process, with the school district objectively communicating vital information and the PAC following through with the "vote yes" pitch.

As research indicated some support existed for the bond issue, the campaign was designed to cultivate this support and to encourage strong supporters and likely supporters to get to the polls.

To ensure a large voter turnout, the school board chose to go to the voters on "Super Tuesday," March 8, 1988. Also on the ballot that day was Florida's presidential primary.

(It should be noted that finance campaign research has shown that large urban areas—such as Dade County—can win elections by voting on major election days, while smaller and suburban districts find such dates produced negative results.)

Targeted publics

The market targeted for the campaign was divided into internal and external publics. The internal publics included: teachers, school employees, parents of public school students and students of voting age.

External publics included all other citizens which were further segmented according to age and ethnicity—black, white, Hispanic and other factors.

Communication

Although the school board did not officially choose to announce the bond issue until December 1987, the communication campaign began in July 1987.

During that month, key opinion leaders were asked to lend their support to the campaign. These people included top PTA and teacher union officials and leaders of Dade County's black, Hispanic, elderly and business communities. They were contacted primarily by letter from the superintendent of schools.

The campaign was orchestrated to build slowly and climax on election day. On that day, and on days just before it, television advertisements were aired on three Dade County network affiliates. Also, ads were carried in the market's two major daily newspapers and in community newspapers. More than $40,000 in private money was spent on advertising. Other major communication strategies and activities included:

- the issuance of press releases (in English and Spanish) which generated more than 200 news items and editorials in 10 newspapers, seven television stations and approximately a dozen radio stations
- a pamphlet mailed directly to all registered voters
- a voter registration drive to ensure that teachers, school employees, parents and adult (18-year old) students were eligible to vote
- a speakers bureau which targeted opinion leaders in the black, Hispanic, elderly and business communities
- PTA meetings at which principals of every school met with parents, teachers and other citizens to give the facts and encourage them to vote
- Town Hall meetings in which the superintendent met with citizens in each high-school feeder pattern
- television programs, aired on the district's internal network, which provided employees with facts about the election and urged them to vote
- appearances by the superintendent and other officials on radio and television public affairs programs
- letters from the chief executive officers of large corporations urging their employees to vote for the bond issue
- a fund-raising banquet attended by more than 1,000 community leaders, which raised $400,000 for the campaign

Evaluation

On March 8, 1988, the bond issue passed with a 52 percent majority. (In Florida a simple majority plus one is needed for approval of bond issues.)

Source: Campbell (1989)

Appendix F:
Case Study—Small School District

Case Study:
Small School District, Mill Levy Election

'Three strikes and you're out'
Re-establish Local Funding of Schools—Mill Levy Election
Billings (Mont.) Public Schools

In 1985, for the first time in history, Billings (Mont.) Public Schools lost two mill levy elections and was faced with loss of over one-fourth of its operating funds in the event of a third levy failure.

If the levy failed a third time, over $11 million would have been swept from the budget, resulting in the loss of over 480 jobs, all sports and activities, the double-shifting of one high school and eight elementary schools, and much more!

Assessment
Analyzing these inevitable losses led to one simple conclusion: Mobilize! Planning needed to be district-wide and community-wide. More volunteers had to be recruited, more campaign efforts undertaken and more media attention focused on local funding of Billings schools than ever before.

Planning
The campaign strategy had four main points:

1. Set up a mill levy task force
2. Recruit and delegate internal and external volunteers
3. Dovetail with and facilitate volunteers' work
4. Raise community awareness.

Communication
The mill task force, composed of members of the news media and school district personnel (approximately 20 members), met weekly during the final six weeks of the campaign, identified issues that would affect the voting public and advised the Board of Trustees. Members of the media were very candid in their appraisal of the situation and gave tips on how to increase the school district's credibility.

A volunteer group entitled "Support Your Schools" was formed to work in many areas of the campaign.

Conducted a community meeting chaired by the school district public relations office, with brief presentations by school board members, PTA president and chair of "Support Your Schools" volunteer group. A checklist of options for "How You Can Help" was completed by participants. The checklist resulted in the recruitment of:

350 Block-walkers
112 Phone bank volunteers
30 People for mailing committee
22 People working at supermarkets

110 Donors (toward paid advertising)
10 Persons working with marquee (billboard) owners to arrange promotional messages.

In addition full-page tabloid-size ads encouraging absentee balloting were run. The election was held July 16 (a date all election veterans say to avoid—during the summer when schools are closed) when many people were away on vacation. The district recorded the largest number of absentee ballots ever cast in a school election!

Community leaders did TV and radio testimonial-style voter information public service spots. Local disc jockeys donated their time and skills in editing the spots which were aired intensively during the two days preceding the election.

A massive block-walking effort was conducted on the Saturday prior to election day.

This covered 50 precincts with over 350 volunteers, mostly members of local PTO's and PTA's.

A Phone Bank was conducted the two nights preceding the election over lines donated by the local medical clinic.

The local newspaper made a last-minute unprecedented decision to run ads in favor of the levy election. The school district provided them with information for their ads and for newspaper-sponsored radio spots.

Students wrote articles in the two high school newspapers, made signs and banners which were hung on the athletic field fences and stadiums and staffed information tables at grocery stores and shopping malls.

Evaluation

The largest voter turnout in Billing's school election history approved the two mill levy. As a result of good media coverage, grass-roots organizing, and to-the-point printed and electronic publications, the community realized what was at stake and rallied in support of their schools. Among the most significant things revealed in the post-campaign evaluation were:

- Recognition that the support and the confidence of the community do exist, but so do certain problems.
- Identification of credibility problems and staff morale problems and the formulation of plans to improve.
- The development of a mailing list of over 10,000 hitherto unidentified potential YES voters.
- Retention of a volunteer framework for more community involvement.

Source: Campbell (1989)

Appendix G:
What They Are Saying

"...If we don't vote for the levies, our children won't get the schooling they need and deserve." **Bill Pollard**

"Our blue ribbon schools are worth bragging about–and worth voting for February 5."
J.W. (Choppy) Saunders

"The Middletown Board of Realtors unanimously ratified a motion to support the school levies...we know that quality communities need quality schools."
Steve Oyer, Chairman, Board of Realtors

"As an alumnus of Fenwick High School (1969) and a member of the Middletown community, I want to add my voice to those in support of the upcoming tax levy for school improvements." **James Akers**

"Support for the cities' schools fulfills a social contract between the generations...for a small investment, voters can assure a bright future for the children of Middletown City Schools. Vote yes February 5th."
Editorial, Radio Station WPFB

"Our children are out of school now, but we will be voting for both school levies February 5. That's m
of our obligation to those good citizens wh
helped support our children's educatio

"How can we deny
ed school program
buildings?" **Kath**

"I believe that the levies m
kids are depending on us fo
either pay the price now or we'
Rev. Law

"The passage of the levies is impo
and future of the local economy."
Ha .. Kramer

"I am voting for the tax levies because I will be making an investment in my own future by giving Middletown's future leaders a chance for a good education."
Rossella Harper

"Good schools are a major ingredient in maintaining property values. The decision for individuals to reside here and for business and industry to locate in the area are based, in great part, upon the support given to, and the results achieved by, the school system. The City Commission encourages the citizens of the Middletown School District to support the schools by voting YES on February 5."
Adopted 1/18/85, Middletown City Commission

"In my opinion, our children deserve the finest in public education. I plan to vote 'for' both of the levies." **Dean Johnson**

"A blue ribbon reading program is of no use to anyone if the students don't have buildings suitable for learning and the necessary funds for the support of the educational system. The Concerned Parents for Reading urge you to help the students in the Middletown City School System and vote for the ''x levies." **Tom Dowden**

"Blue ribb
educ
essential to provide the
'rst-class community."
Seth Johnson

to operate our
'r how our child-
ıpporting both
Tom Brickey

ısly endorsed
3 ballot. We
.evies and not the

Carl D. Hollon, Trustee

.f the school levy is actually an
.ıment because it preserves our real
estate values." **Stan Sorrell**

"We have had no major drug or common youth related problems in the Middletown School System as a result of effective, ongoing cooperation between the schools and our department."
Deputy Chief Ernest Howard

"Middletown levies deserve your vote...we strongly urge you support both issues."
Middletown Journal

"Endorsements from key community members can carry great weight with voters. How one's neighbor, city council member, and local shop owner votes, and why, on school finance issues influences voters in the respective peer groups."

Source: Campbell (1989)

Appendix H:
Precinct Reporting Sheet

Precinct reporting sheet

School Election: **Turnout:**

_____ % YES
_____ % Turnout

Precinct	% YES	% Turnout	District #	Target Primary	Target General

Bibliography

Campbell, Gay. *Win at the Polls: A Finance Campaign Planner*. Arlington, Virginia: National School Public Relations Association, 1989.

Chang, Vern, and Gil Albiani. "Need Two-Thirds to Pass? (No Worries!)." Elk Grove, California: Elk Grove Unified School District, 1987.

Chopra, Raj K. "How We Passed a Bond Issue Hard on the Heels of a Tax Hike." *The American School Board Journal* 175, 6 (June 1988): 26-27.

Doyle, Dennis. "Is American Education on a Collision Course with the Future?" Supplement to *Business Week* (October 1989): 1-137.

"Education in America: A New Look." Supplement to *Newsweek* (March 12, 1990).

Goldstein, William. *Selling School Budgets in Hard Times*. Bloomington, IN: Phi Delta Kappa Educational Foundation, 1984. 37 pages.

Finn, Chester E., and Diane Ravitch. "Survey Results: U.S. 17-year-olds know Shockingly Little about History and Literature," *The American School Board Journal* (October 1987): 31-33.

Hamel, George F. "Fairfax County Loves Its Schools." *School Business Affairs* 50, 2 (February 1984): 32-33.

Hawkins, Craig. "Bethel Did It!" Eugene, Oregon: Bethel School District, January 1990.

Henry, Jeannie M. "Help for Passing Bond Referenda." *School Business Affairs* 53,12 (December 1987): 25-27.

Holly, William J. *Developing, Managing, and Gaining Public Support for the School District Budget*. OSSC Bulletin Series. Eugene, Oregon: Oregon School Study Council, February 1987. 36 pages.

Newmark, Barbara. "A School District Decides: A Successful Campaign Strategy." *Phi Delta Kappan* 64, 3 (September 1983): 202-3.

Oglesby, James R., and Thomas A. Shannon. "Education Vital Signs."

Supplement to *American School Board Journal* 176, 10 (October 1989): A12-13.

Piele, Philip K. "People and Politics in an Electronic Age." *Community Education Journal* 10, 4 (July 1983): 7-8.

_____. "Public Support for Public Schools: The Past, the Future, and the Federal Role." *Teacher's College Record* 84, 3 (Spring 1983): 690-707.

Piele, Philip K., and John Stuart Hall. *Budgets, Bonds, and Ballots*. Lexington, MA: DC Heath and Co., 1973.

Puzey, Janet. "Facing a Hostile, Organized Opposition." Unpublished paper, 1988.

Sheathelm, Herbert H. "A Citizen Visiting Team: Planning and Implementation." *Educational Planning* 6, 1 (Spring 1987): 24-35.

"What It's Worth: Educational Background and Economic Status." Washington, DC: U.S. Census Bureau, 1987.

Wright, Jeff. "Who Are the New Neighbors?" *Register-Guard*, Eugene, Oregon. January14, 1990.

_____. "Answer to School Tax Woes Elusive, Not Impossible." *Register-Guard*, Eugene, Oregon. (March 25, 1990): 17-18G.

_____. "Crowded School Forced to Improvise." *Register-Guard*, Eugene, Oregon. (September 5, 1989): 1D.

Interviews

Kay Black, reporter for *The Register-Guard*, Eugene, Oregon. Telephone interview, March 26, 1990.

Judy Collett, Lane County (Oregon) Elections Division. Telephone Interview, March 26, 1990.

Richard D. Eisenhauer, Superintendent, Douglas County School District, Roseburg, Oregon. Telephone Interview, March 29, 1990.

Steven Goldschmidt, Professor of Education, University of Oregon, University of Oregon, Eugene, Oregon. Personal Interview, February 21, 1990.

Norman L. Hand, Hood River County School District, Hood River, Oregon. Telephone Interview, March 29, 1990.

Bob Jones, Research Analyst, Oregon State Department of Education, Salem, Oregon. Telephone Interview, June 1, 1990.

Scott Mutchie, Superintendent, Bend School District, Bend, Oregon. Telephone Interview, March 28, 1990.

Philip Piele, Professor, University of Oregon, Eugene, Oregon. Personal Interview, February 15, 1990.

Phillip Riley, Business Manager, Jefferson County School District, Madras, Oregon. Telephone Interview, March 29, 1990.

Steve Wisely, Superintendent, Medford School District, Jackson County Oregon. Telephone Interview, March 28, 1990.